

CATTM

III

OWNER'S
MANUAL

Chang Labs

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Chapter 1

Getting Started

This is the owner's manual for C•A•T III.

This chapter explains the importance of the registration card; the contents of this manual and the other manuals included in the C•A•T III package; the equipment you need to use C•A•T; how to install C•A•T; and the need to create backup copies of your files.

Before You Begin

Here are a few things to do or consider before you start to learn about C•A•T.

Registration card

Included in the C•A•T package is the owner's registration card.

Fill in and return this card.

There are two reasons:

- When we receive the registration card, we send you your user identification number. Without this number, you will not receive telephone support.
- Unless we receive the card (which contain your name and address), we cannot notify you of product upgrades, newsletters, etc.

My ID number: _____

Date received: _____

Customer support

Customers can receive telephone support directly from Chang Labs. This service is free for 90 days after the date of purchase. Thereafter, you can purchase an Extended Support policy.

At all times, phone calls are at the customer's expense.

Chang Labs' user support department is available from:

**9:00 A.M. to 5:00 P.M.
(Pacific Time)
Monday through Friday**

except national holidays. Please have your ID number and this manual handy when you call. The telephone number is:

(408)-727-8096

You can also write to:

User Support
Chang Labs
3350 Scott Blvd., #25
Santa Clara, CA 95054

Illegal copies

C•A•T III is not copy protected for your convenience.

It is illegal to share one copy of the licensed program among many computers.

Please help us enforce the law by keeping an eye on your copy of the program.

System requirements

C•A•T III requires the following equipment:

- a Macintosh 512E, Plus, SE, II, IIX, IICx, IICi, IIfx, SE/30, Portable, or newer models.
- one megabyte of RAM.
- a hard drive (or less optimally, two 800K floppy drives).
- any model of the Image-Writer or LaserWriter printers.

About the manuals

C•A•T III comes with three manuals:

- **Owner's Manual** – Start with manual to learn about C•A•T.

Chapter 1 – Getting started, making backups, etc.

Chapter 2 – Tutorial for first-time users.

Chapters 3 to 9 – Detailed descriptions of all C•A•T operations (except word processing and form processing).

Command Reference – Brief descriptions of each menu command.

- **Word Processing Manual** – This is for those new to word processing. It contains a tutorial and step-by-step instructions.
- **Form Processing Manual** – This is for users who need to design forms. It contains a tutorial and step-by-step instructions.

Getting Started

First, you need to:

- Install C•A•T on your hard disk; or if using floppy drives, create a working copy.

- Create a new C•A•T file.

This chapter assumes that you know basic Macintosh terms such as windows, folders, and dragging.

If these terms are new to you, consult the first chapters of your Macintosh manual.

Storing Floppy Disks

Store your program disks and any backups in a safe place. They should be protected from:

- direct sunlight
- heating units
- magnetic fields
- moisture
- smoke or dust.

To install on a hard disk

- Choose New Folder from the File menu.

- Rename the folder 'C•A•T FOLDER'.

- Insert the C•A•T program disk into the Macintosh disk drive.

- Double-click on the disk icon.

A window opens showing the icons for the C•A•T III program and a tutorial file.

- Drag the files on the disk to the new folder you created.

- Eject the program disk and store it in a safe place.

To use two disk drives

You can use C•A•T on a system with two disk drives. One of the drives can be a RAM disk like those available on portables.

- To use C•A•T with two drives, make a copy of your Macintosh startup disk and drag the C•A•T program from the C•A•T III disk to the new startup disk.

If the program won't fit, delete some fonts and desk accessories from the System disk.

- Use the second drive for your C•A•T data file.

An 800K or 1.5M C•A•T file can hold a substantial number of records. The performance for most commands will be satisfactory.

Set the RAM cache

To optimize performance:

- Choose the Control Panel from the Apple menu.
- Set the RAM Cache for at least 32K, or 64K if you have the memory and select On.

Size limits on files

The theoretical limit is about 16,000 accounts, 16,000 contacts, 4,000 templates, and 32,000 documents per file. Each file may exceed 2,000,000,000 bytes in size.

But there are practical considerations that keep you from reaching these limits.

- If you have more than 2,000 accounts, consider dividing them into several files—so that they can be maintained by multiple users.
- Because C•A•T is a relational filing system, a small number of accounts can quickly grow into a large file as you add documents for each contact.
- The capacity of most hard disks is less than 100 megabytes.

You can always use the export and import features to reorganize files.

To create a new file

- Double-click on the C•A•T III icon.

The program is loaded, and the open dialog allows you to select the C•A•T file to open.

- Click New.

C•A•T opens the Name Card window to let you enter your contacts.

- After entering some names, templates, and other data, choose Save from the File menu.

The save dialog allows you to name the file.

- Enter a name such as 'Joe's C•A•T' or 'West Coast Accounts'. Click Save.

In the future, you can double-click on the file to open the file.

Protecting Files

It is important to protect your C•A•T files by copying them to floppy disks.

You need to make back up copies to protect against mishaps that may damage part of your file.

This should not happen. But accidents and problems do occur.

It pays to play it safe by backing up your data.

It's good common sense—and easy to overlook.

For step-by-step instructions on copying files, backing up files, and using the auto save changes feature, see Chapter 9.

The double backup system

Create two floppy disk backups of your files. We'll call these backups A and B.

On Monday, at the end of the work day, back your file up on A. Don't touch B.

On Tuesday, back your file up on B. Don't touch A.

On Wednesday, back your file up on A. Don't touch B. And so on.

Here's why. Assume you have only one backup. Your file is damaged and you don't realize this when it happens.

You now use the Save command, corrupting the working copy of the file. Then you copy that corrupted file onto your backup.

The next morning you discover that both the working and backup copies are corrupted. That's why you need a second backup.

Never update *both* backup

To auto save changes

C•A•T's auto-save changes feature can protect you against problems.

- Choose Output to Disk ▸ Set Auto-save Changes from the File menu.
- Select 'Delete CHG file after successful save'. Click OK.

Now, when you make changes to the file, C•A•T periodically writes the changes to a disk file with a suffix CHG.

When you use Save (and save all changes to disk), C•A•T deletes the CHG file and begins a new one.

If a problem occurs, you can recover any changes that have been saved to the CHG file.

You don't need to make backups everyday. You should make backups regularly such as on a weekly or monthly basis.

You should make a backup when you have made lots of important changes. The wrong time to backup a file is when you have discovered a problem. The right time is when you don't need to.

Chapter 2

Learning C•A•T

The challenge is to manage the things you do everyday—faster, easier. C•A•T simply lets you do more, faster.

C•A•T is the relational database that manages documents by contacts, activities, and time. C•A•T produces, tracks, and manages thousands of documents at the average desk.

Standard menus make the location and meaning of commands familiar to all Macintosh users. The relational architecture delivers instant, multi-dimensional solutions that are more adaptable.

This chapter is a tutorial. It takes you on a step-by-step tour of C•A•T's major features. It uses a sample file created for this purpose.

After completing the tutorial, explore the file. It contains templates and examples that can show you more uses for C•A•T.

Macintosh Basics

Brief summary of Terms

You should be familiar with the following Macintosh terms and conventions:

- Clicking and double-clicking to make selections and open disks, windows, folders, programs, and documents.
- Clicking the close box and zoom box on windows.
- Dragging to choose commands from the menus.
- Clicking and double-clicking to mark the insertion point.
- Inserting, replacing, and deleting text at the insertion point.
- Using commands to format text; select font, size, style for text; and cut, copy and paste text.
- Clicking, shift-clicking to select objects.
- Dragging to move or size objects and windows.

These conventions are covered step-by-step in the C•A•T III Owner's Manual or the Macintosh Owner's Manual.

If you are new to the Macintosh, here is a brief description of a few terms you need to know.

- **Choose:** To pick a command from a menu using the mouse. Point to a menu title, drag down to the command you want, then release the mouse button.
- **Click:** To quickly press and release the mouse button.
- **Double-click:** To quickly press and release the mouse button twice. If you don't get the expected results, try again—but click faster.
- **Drag:** To position the pointer on an object or command, then press and hold the mouse button while you move the mouse.
- **Insertion point:** Either a flashing vertical bar or a range of text displayed in reverse that designates where the next action will be inserted.
- **Point:** To position the pointer on a command or object.

- **Pointer:** A small arrow that moves across your screen as you move the mouse.
- **Select:** To point, then click—to select an icon, record, object, box, or other item on windows.

Getting Started

To quit

- Start up your Macintosh.
- If you are using a hard disk, open the folder containing your C•A•T files.
- If you are two disk drives, insert the C•A•T program disk into either disk drive.
- Double-click on the Quick Start icon to start up C•A•T III and load the Quick Start file. Quick Start



In a few seconds, you will be ready to begin the first project.

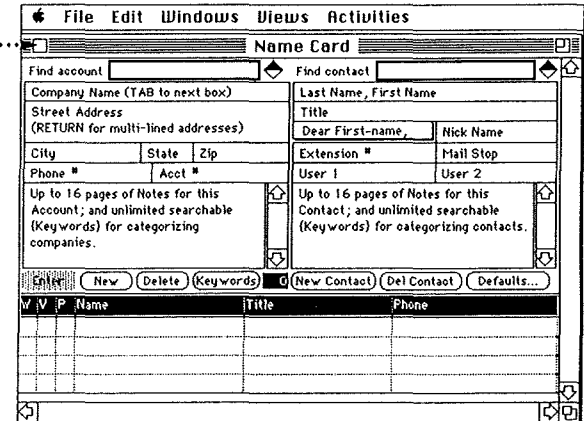
If you get off track or want to start over, choose Quit from the File menu.

If you made any changes, C•A•T asks if the changes should be saved. If you want to reuse this Quick Start, click No.

If you want to keep the changes, click Yes.

After you make changes, the illustrations in this manual may not match what you see on screen.

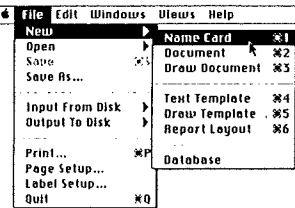
If too many windows are open, hide windows by clicking the close box. You can open windows again using the New or Open commands from the File menu, or by using the Windows menu.



1. Managing Names

C•A•T manages documents by Contacts, Activities, and Time. The first project is to enter names and addresses.

Normally, you open the Name Card window by choosing New > Name Card from the File menu.



When you first start C•A•T, the Name Card is open. Thus you can proceed directly to data entry.

An 'account' is a mailing address, usually a company. You can have many contacts at one account.

If the contact is a personal one with no company affiliation, delete the 'company name' prompt and proceed to enter the remaining data. This contact will be alphabetized using the person's last name.

Use -, /, or () to separate parts of the phone number.

The 'Acct #', 'User 1', and 'User 2' boxes can be used for any purpose. For example, define 'Acct #' to mean AppleLink numbers.

Use the note boxes to record custom items like home phone numbers, Fax #'s, home addresses, etc.

To enter names

■ Replace the prompt text in each box with the name and address data as shown below.

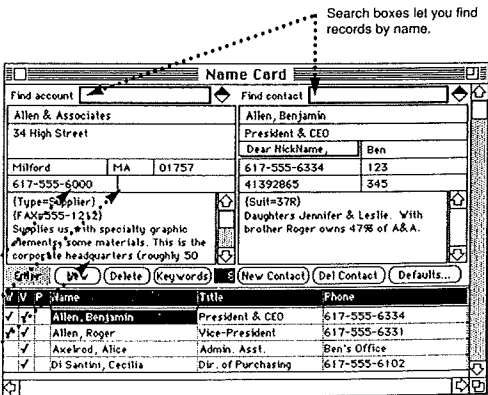
Use the tab key to move from one box to the next.

As you tab to a box, all the prompt text is selected waiting for your next keystroke to replace it.

The Enter button

■ When all entries are complete, click Enter.

C•A•T saves your data and grays Enter. If you entered a contact name on the right side, it is added to the list at the bottom.



To add a contact

A Name Card allows you to enter unlimited contacts for an account or organization.

To add a contact:

- Click New Contact (or press ⌘-N).

The right half shows the prompt text again and 'contact name' is selected.

- Type the name:

Steven J. Smith

- Press the tab key to select the 'title' box. Type:

Vice President

- Click Enter.

The second contact is added to the alphabetical list at the bottom.

About Name Cards

Use the Name Card to:

- Add more accounts by clicking New (or pressing ⌘-N) and entering more names.
- Search by selecting either 'Find account' or 'Find contact', then typing a name.

C•A•T searches as you type and displays the selected name card.

- Click the top or bottom half of the Next buttons to select the prior or next name card.

The Page Up and Page Down keys of extended keyboards achieve the same result.

- Make changes to a name card by selecting it, making the changes, and clicking Enter.
- Edit a contact by selecting a contact from the list at the bottom.
- Delete a selected account or contact by clicking Delete or Del Contact.

Feel free to try these tasks.

◆ Next button.
Click top half for prior record.
Click bottom half for next record.

2. Merge a Letter

C•A•T lets you produce merged documents—instantly.

For the second project, you will merge data from the Name Card with the 'Standard Letter' template supplied with the Quick Start—to write a letter to 'Ben Allen' at 'Allen & Associates'.

To select a name card

- Choose Open ♦ Name Card from the File menu.

If the Name Card is not open, C•A•T opens it. 'Find account' is selected to let you search by typing the account name.

- Type:

allen

These characters are enough for C•A•T to select 'Allen & Associates' and show the data.

To create a letter

- Choose Standard Letter from the Activities menu.

C•A•T opens the Document window below and shows the merged document on the right side.

- Select the insertion point under 'Dear Ben:'.

- Type the following:

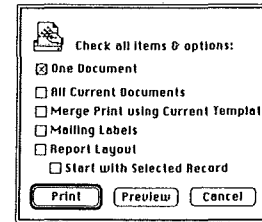
This is my first letter using CAT.

- Click Enter.

C•A•T saves the document and grays Enter.

To print the letter

- Choose Print from the File menu.
- Check One Document.
- Click Preview to show the document on screen, or click Print to actually print it.



About documents

- All documents are saved and filed by contact, activity, and time.
- As you create documents or templates, you have full control over margins, justification, line spacing, page breaks, tab stops, and text fonts, sizes, and styles.

You use the Document List window to find and open saved documents.

- To save time, you can create many documents and batch print documents.

Also, you can batch print the labels or envelopes for each document.

Use standard Macintosh conventions to make changes.

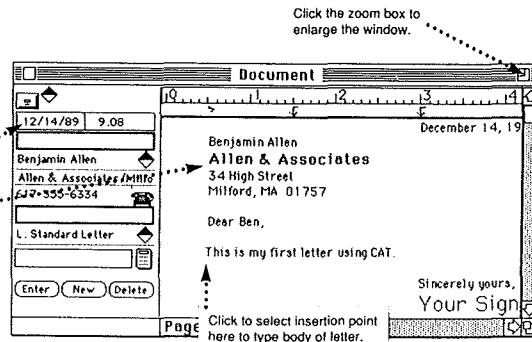
- A document does not need to be a merged document. A document can be any text you enter in the Document window—a brief message or whatever.

The left side shows the contact, activity, and time selections for the document.

Current date & time are used unless you enter other data.

The right side shows the merged document. C•A•T has already merged the name and address with the remaining text of the template.

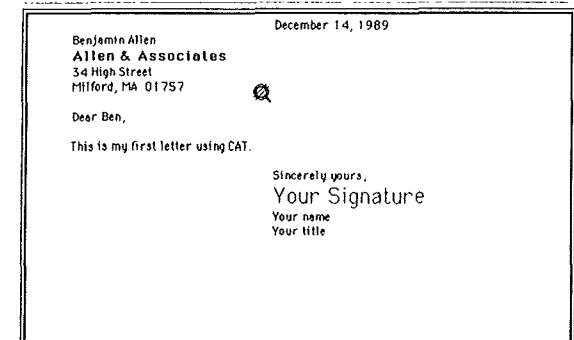
Use standard Macintosh conventions to control margins, tab stops, justification, spacing, page breaks, and text fonts, sizes, and styles.



To enlarge a previewed document, click on the document. Click again to unzoom.

To preview the next page, click in the gray area outside the document.

To cancel the preview, click outside the dialog box in the menu bar.



3. Merge a Form

C•A•T also produces merged forms—instantly.

The third project uses the 'Purchase Order' template—to issue an order to 'Jim Buchanan' at 'Edwards Aerospace'.

- Choose New Document from the File menu.

C•A•T opens the Document window.

For this project, you will select the contact and template for the merged document directly from the Document window.

To select the contact

- Select the bold box above the word 'Contact'.

When you select the box, the last-used contact is selected.

For example, 'Benjamin Allen' from the last project might be selected.

- To select 'Buchanan', type:

buchanan

As you type, C•A•T selects the best match. Stop typing when the name you want is shown.

To select the template

- Select the bold box above the word 'Activity'.

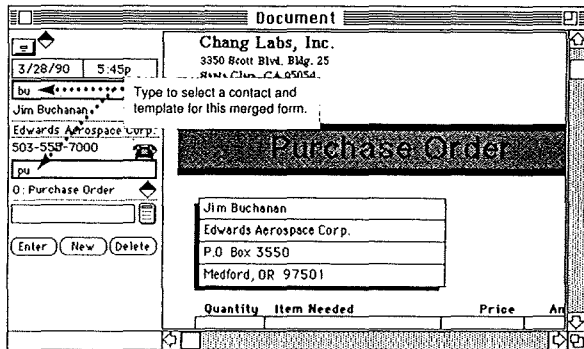
When you select the box, the last-used template is selected.

For example, the window might show a merged 'Standard Letter' to 'Jim Buchanan' from the last project.

- To select the 'Purchase Order' template, type:

purchase

As you type, C•A•T again selects the best match. Stop typing when the template you want is shown.



C•A•T shows the merged Purchase Order inserting the name and address from the Name Card.

Templates can include formulas for calculations, summations, and other computations.

Templates can also supply default text for merged documents.

To complete the form

- Select the 'Quantity' box on the purchase requisition.

- Type:

5

- Select each remaining box and complete the form as shown below.

- Click Enter.

C•A•T evaluates any formulas, saves the document, and grays Enter.

To print the form

- Choose Print from the File menu.

C•A•T shows the print choices in a dialog.

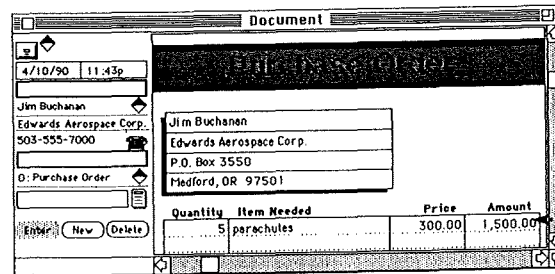
- Check One Document.

- Click Preview to show the document on screen, or click Print to actually print it.

About forms

Generally, text can be typed into any box on a form.

- If the box contains a computed result (e.g., a total at the bottom of a column), then you cannot click to select the box, nor make any direct editing changes.
- If the box contains a reference (the name and address in the illustration below), the merged data can be changed.
- If a box contains default text from the template, the text can be changed to any text and saved with the merged document.
- You cannot change fonts, sizes, and styles for text in merged documents. To change formatting, open the Template window.



.....This amount is computed after you click Enter.

4. Printing Labels

You can use C•A•T to create a mailing list and print labels for each name.

The fourth project is to find every account with zip codes in the range 90000-99999 and print mailing labels.

Each account that matches the search criteria is checked and displayed.

Each contact that matches the search criteria is also checked.

If no contact criterion (e.g., title) is given, as in this case, every contact becomes part of the view. You can manually add or remove checkmarks by clicking.

To choose a saveable list

- Choose Name List from the Windows menu.
- C•A•T opens the Name List window. Now choose one of the saveable views from the Views menu.
- Choose view 1 from the Views menu.

To make a list

- Choose Make View from the Windows menu.
- C•A•T shows the Make View dialog shown below to the left.
- Enter a title for the view.
- Select 'Zip Code' and type: 90...99
- Click Search.
- C•A•T shows the results in the Name List window.

To set up labels

- Choose Label Setup from the File menu.
- C•A•T shows a dialog.
- Click New.
- C•A•T shows the label setup dialog.
- Type a label name and set other options.
- Click OK.

To select text font, size, and style for an item, click on the item.

Click Page Setup to set paper size and orientation.

You can design and save many layouts for different sized labels and envelopes.

To print labels

- Choose Print from the File menu.
- C•A•T shows a dialog of printing choices.
- Check Mailing Labels.
- Click Preview to show the labels on screen.
- Choose a layout from the pop-up menu; select 'Use Name List'; and click OK.

5. Mail Merge

C•A•T uses templates to produce instantly merged documents.

The fifth project is to create a text template and merge print the template with each name from a list of names.

Text template

- Choose New ♦ Text Template from the File menu.

C•A•T opens the Template window.

- Give the template the following activity name:

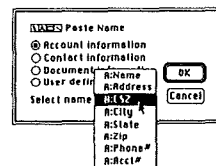
Seminar thank you

- To start text entry, select any part of the empty template area on the right.

To paste references

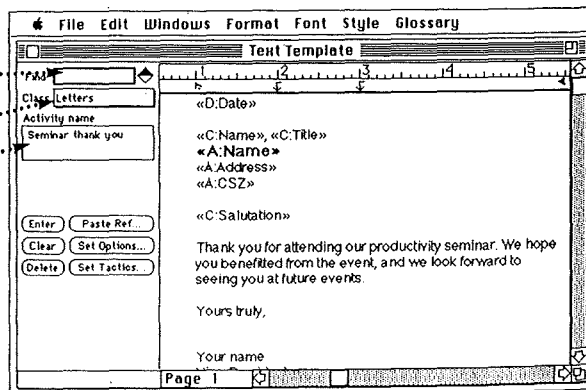
C•A•T lets you reference data from the Name Card. To add a reference:

- Click the Paste Ref button.



- Choose A:CSZ (city, state, zip) from the pop-up menu. Click OK.

C•A•T pastes the reference into your



Type in the instant search box to open existing templates by name.

Click pop-up menu to classify template by type of activity.

Enter an activity or template name.

Use standard Macintosh conventions to control margins, tab stops, justification, line spacing, page breaks, and text fonts, sizes, and styles.

To paste from the Glossary

The custom Glossary menu lets you paste blocks of text without typing.

- Choose Select All from the Edit menu.

- Choose 'Business Header' from the Glossary menu.

'Business Header' includes the references for a typical letter.

- Type the following body:

Thank you for attending our productivity seminar. We hope you benefitted from the event, and we look forward to seeing you at future events.

- Press Return twice and choose 'Standard Closing' from the Glossary menu.

- Click Enter.

C•A•T saves the template and grants Enter.

Merge print preparation

Normally, to merge print, you first select a template from the Activity List or open the template from the Template window.

Since the sample template is already selected, you can proceed directly to print.

- Choose a name list from the Views menu.

To merge print

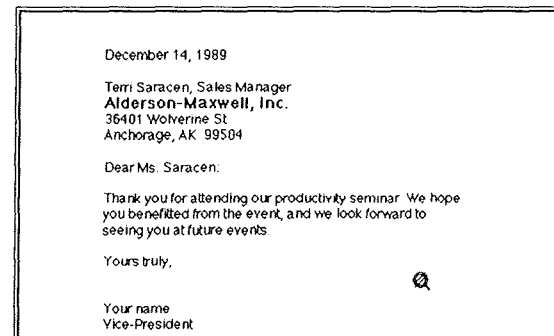
- Choose Print from the File menu.

C•A•T shows a dialog of printing choices.

- Check Merge Print and click Preview.

C•A•T prints a letter for each name in your name list. For each name, C•A•T replaces references with data from the Name Card.

- To cancel the preview, click outside the dialog—e.g., in the menu bar.



6. Draw Document

C•A•T has drawing tools for creating templates.

You can also use the drawing tools to create simple documents.

For this project, let's draw a procedure chart to illustrate the drawing features.

- Choose New ▾ Draw Document from the File menu.

C•A•T opens the Document window.

In addition to the contact, activity, and time boxes, C•A•T shows a toolbox at the upper left. Use the toolbox to draw boxes, text, and lines.

The right side is your drawing area.

When editing objects, C•A•T varies from standard draw programs.

To edit the text in a box, you don't need to first select the alpha tool—just select the box.

To move an object that is selected, point to an edge of the object and drag to move.

To delete an object, use Cut or Clear from the Edit menu—not the Delete key.

To draw a box for text



- Select the box tool.
- Move the pointer to the drawing area and position it 1" down and 1" from the left.
- Click and hold the mouse button; drag to 1-1/2" down and 3" from the left; release the mouse.

C•A•T draws the box.

- Type:
Design
- Choose Text Align ▾ Center from the Format menu.
- Choose 18 pt from the Style menu.

If you have a color monitor, you can select the colors for the text, background, and borders by double-clicking on the box.

To duplicate objects

- Choose Duplicate from the Edit menu (or press ⌘-D).

C•A•T duplicates the box. The text in the duplicate box is selected.

- Replace the selected text by typing:

Propose

- To move the box 1" below the first box—click on any edge of the box and hold the mouse button; drag to 2-1/2" down and 1" from the left; release the mouse.
- Repeat the above steps and create a third box containing the word Feedback and position it to the right of the top box.

If the box you want to move is not selected (i.e. no black squares at each corner), you can move the box by clicking anywhere on the box, not just on the edge.

Click and drag the black squares at each

To draw lines



- Select the line tool.
- Move the pointer to the mid bottom of the first box.
- Click and hold the mouse button; drag to the mid top of the second box; release the mouse.

C•A•T draws a line connecting the two boxes.

You can move the line by dragging it. Change the line by dragging the black squares at the ends.

- Repeat the above steps to draw two more lines, as shown below.

To paste a logo

- Choose 'C•A•T logo' from the Library menu.
Library is a custom menu of pictures and objects.

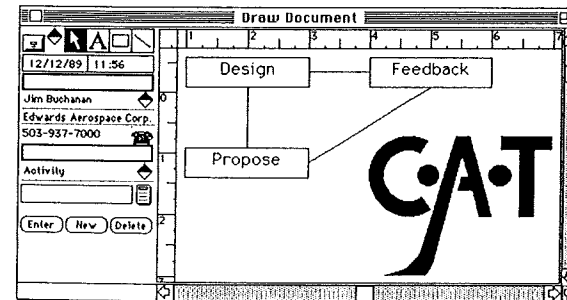
The logo was prepared using MacDraw and imported via the Clipboard.

- Move the logo by dragging it to where you want it.
- Click New.

C•A•T will discard this document without saving.

About drawing

- You can select, group, move, resize, copy, cut, paste, and work with multiple objects.
- Objects can align to a grid. You select different grids and rulers or turn off the feature using commands from the Format menu.
- You can change the zoom factor in increments of 25% from 25% to 200%.
- Objects may overlap. Commands in the Format menu let you change the front-to-back ordering of objects.
- For each object, you can select a background and line pattern from a palette of 40 patterns.



7. Forms Merge

C•A•T templates can be graphical forms.

The seventh project is to open and alter a draw template named 'Survey'; then merge print the template with each name from a list of names.

Draw templates

- Choose Open ▸ Draw Template from the File menu.

C•A•T opens the Template window. The search box at the top is selected.

- To open the 'survey' template, type:

survey

C•A•T finds and opens the survey form.

To change a reference

To change the city-state-zip reference to a phone number reference:

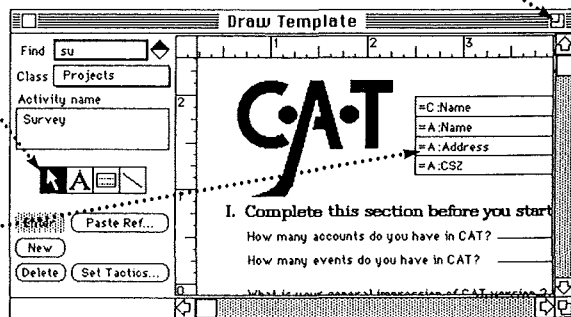
- Select '=A:CSZ'.
- Click the Paste Ref... button on the left side.
- Choose 'A:Phone#' from the pop-up menu and click OK.

C•A•T pastes the new reference into the template.

- Click Enter.

C•A•T saves the changes and grays Enter.

Click the zoom box to enlarge the window.



Create boxes, lines, and text with the standard tool box.

Use the Format menu to choose alignment; line pattern and size; and fill pattern.

Use the Font and Style menus to choose text font, size, and style.

Double-click on objects to set colors, borders, and box formulas.

The boxes in the form can contain references to name and address data, formulas for computations and summations, or default text.

Merge print preparation

Normally, to merge print, you first select a template from the Activity List or open the template using the instant search box on the Template window.

Since the sample template is already selected, you can proceed directly to print.

- Choose a name list from the Views menu.

To merge print forms

- Choose Print from the File menu.

C•A•T shows the dialog of print choices.

- Check Merge Print and click Preview.

C•A•T prints a form for each name in your name list. For each name, C•A•T replaces references with data from the Name Card.

- To cancel the preview, click outside the dialog — e.g., in the menu bar.

C•A•T

Terri Saracen
Alderson-Maxwell, Inc.
36401 Wolverine St.
907-555-8300

Model of Macintosh
RAM memory
System version
Third party DAs

I. Complete this section before you start using C•A•T III.

How many accounts do you have in CAT? _____ ■ of Macintosh systems at comp
How many events do you have in CAT? _____ ■ of CAT users at your company

What is your general impression of CAT version 2.04?

.....
.....

What is your expectation of C•A•T III?

8. Finding & Printing Documents

You can select documents by contact, activity, time, company name, class of activity, date, or any combination.

You can save custom document lists as views on the Views menu.

The final project is to find, open for review, and print documents for 'Ben Allen'.

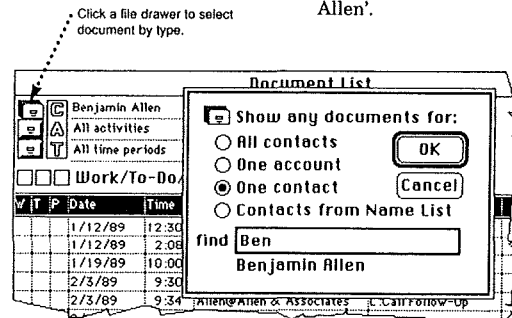
To select documents

- Choose Open ▸ Document from the File menu.
- C•A•T opens the Document List window. At the top left are 3 file drawers.
- Click the topmost file drawer. C•A•T displays the dialog shown below.
- Select 'One contact'. In the instant search box, select 'Ben Allen' by typing:

ben

- Click OK.
- Click the other file drawers and select 'All activities' and 'All time'.

The Document List is set to show documents for 'Ben Allen'.



To save document lists

The selection criteria on the Document List window shows the 'Contact History' for a specific contact. You can save these settings in the Views menu.

To add an item to the Views menu:

- Choose Set Menu from the Views menu.
- Click New.
- C•A•T shows the custom view dialog.
- Enter the title:

Contact History

- Click OK.

The new document list is added to the bottom of the Views menu.

Use views to create custom lists like Account History, Sales Reports, To-Do Lists, Project Status, and Calendars.

To open documents

- Double-click any document on the Document List to open it.

C•A•T opens the Document window and shows the selected document.

- To open and review the remaining documents on the list, click the Next button at the top left of the Document window.

With each click, C•A•T displays the next document.

To refine lists

- Click the file drawer at the top left of the Document window.

C•A•T reopens the Document List.

You can refine the list of documents using the three columns of checkmarks on the left side.

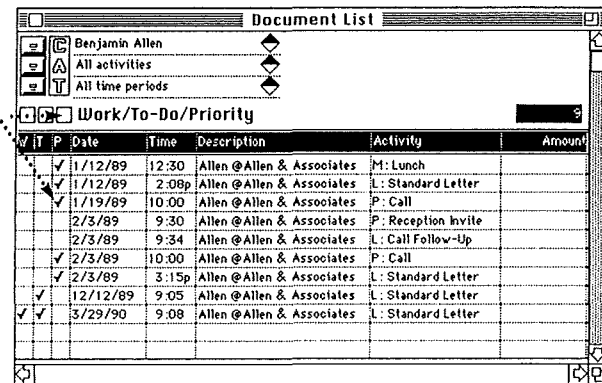
- Click to add or remove checkmarks from specific documents.
- Then check the Work/To-Do/Priority boxes to refine the list of documents to show.

Click in the Priority column to add checkmarks to certain documents.

Then check Priority to display only the selected documents.

Checkmarks are added to the Work column when you enter or change a document. They are removed when you choose Save.

Checkmarks in the To-Do and Priority column can have any meaning specific to each user.



To drag

- Position the pointer on something.
- Press and hold down the mouse button.
- Move the mouse.
- Release the mouse button.

For example, you drag the size box on the lower right of each window to change the size of windows.

To double-click

- Position the pointer on something.
- Press and release the mouse button twice in quick succession.

For example, double-click on the C•A•T program icon to start up C•A•T.

Clicking twice slowly on the same object will not always produce the same result as double-clicking. The first click selects the object, the second click performs some action on the selected object. From the Finder, the second click does nothing to the selected program.

To change the double-click time, choose the Control Panel desk accessory from the Apple menu and select the Mouse icon.

To Shift-click

- Select something by clicking or dragging.
- Hold down the Shift key while you continue to select (or deselect) by clicking or dragging.

For example, you can Shift-click to select text in a document or select multiple objects in a form.

Handling Windows

To activate a window

A window frames its contents. The contents may be a list of records, a specific document, or a calendar.

A window may have:

- a **title bar**
- **scroll bars**
- a **close box**
- a **size box**
- a **zoom box**

Multiple windows can overlap each other on your screen. Use the mouse to manage windows.

- Click on any visible portion of the window.
- Or choose a command from the Open or Windows menu.

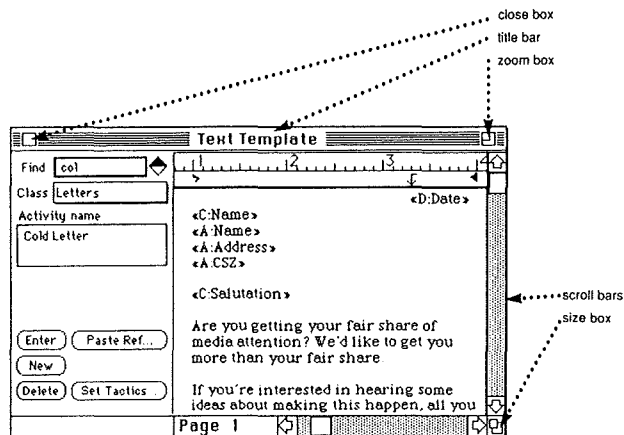
Activating a window brings it to the front of all other windows. You can only change the contents of the active window.

To move a window

- Position the pointer anywhere in the title bar of the window except the close box or zoom box.
- Drag the window to a new location.

For example, if one window completely overlaps another window, move or size the front window until some portion of the hidden window shows on screen.

To have C•A•T remember the position and size of each window, see 'Windows and Desktops' in this chapter.



To change a window's size

- Activate the window by clicking it.
- If the size box in the bottom right corner is not visible, move the window until it is visible.
- Drag the size box.

Depending on the use, windows have minimum and maximum dimensions. C•A•T does not allow you to size windows beyond these limits.

Some windows don't have a size box.

To zoom a window

- Activate the window by clicking it.
- If the zoom box in the top right corner is not visible, move the window until it is visible.
- Click the zoom box.

C•A•T expands the window to the full size of your screen—clicking an expanded window's zoom box shrinks the window back to its smaller size.

Some windows don't have a zoom box.

Depending on the use, windows have minimum and maximum dimensions. C•A•T does not allow you to zoom windows beyond these limits.

To close a window

- Activate the window by clicking it.
- Click the close box in the top left corner (or press ⌘-W keys).

Like the Finder, clicking the close box hides the window. Closing a window does not have the implied meaning of saving a document.

Click the Enter button to save documents.

A closed window can be opened again using commands from the Open or Windows menu.

Scrolling

If the list or document is larger than the window, you can use the scroll bars to show different parts of the list or document in a window.

To scroll line by line

- Click the arrow that points in the direction of what you want to see.

You can scroll continuously line by line by pressing the scroll arrow.

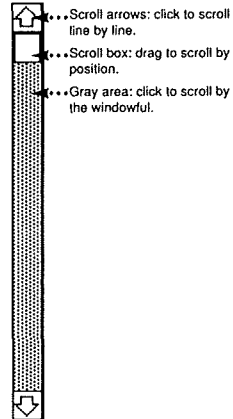
To scroll by the windowful

- Click in the gray area of the scroll bar.

To scroll using the scroll box

- Drag the scroll box to a place in the scroll bar that approximates the position you want to see.

The scroll bar represents the dimensions of the list or document. For example, if you want to go to the top of the document or list, drag the scroll bar to the top.



Windows and Desktops

C•A•T uses specific windows to manage names, templates, and documents. The primary windows are:

- the Name List
- the Name Card
- the Document List
- the Document window.

Other windows include:

- the Activity List
- the Template window
- the Tactics window
- a Calendar

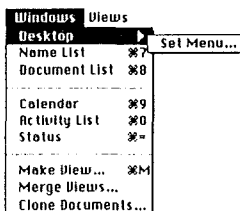
Each chapter explains how to open and work with one or two windows.

You can save many arrangements and sizes of windows on your desktop and add them to the Desktop submenu.

You can instruct C•A•T to use one of these custom desktops on boot up.

To add a desktop

- Move and size windows to the positions you want. You can have one or many open windows.
- Choose Set Menu from the Windows ▾ Desktop submenu.



The custom menu dialog shows a pop-up menu of existing items and buttons for making changes.

- Click New.

C•A•T shows a dialog for capturing the new menu item name.

- Type the name for the new menu item and click OK.
- A last dialog asks if you want to use this desktop at boot up. Click either Yes or No.

The new menu item is added to the Desktop submenu.

To replace a menu item

- Choose the menu item you wish to change from the Windows ▾ Desktop submenu.

C•A•T uses the saved desktop to rearrange your windows.

- Make any changes to window position or size.
- Choose Set Menu from the Windows ▾ Desktop submenu.

C•A•T shows a dialog for managing custom menus.

- Choose the menu item to change from the pop-up menu.
- Click Replace.
- Type the new name for the Desktop item and click OK.
- A last dialog asks if you want to use this desktop at boot up. Click either Yes or No.

The changed menu item replaces the prior entry in your custom menu.

To remove a menu item

- Choose Set Menu from the Windows ▾ Desktop submenu.

C•A•T shows a dialog for managing custom menus.

- Choose the menu item to remove from the pop-up menu.

- Click Remove.

C•A•T shows a dialog to confirm the action.

- Click OK.

The menu item is removed from your custom menu.

To select a desktop

- Choose a desktop from the Windows ▾ Desktop submenu.

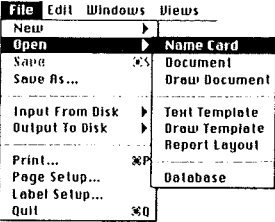
C•A•T uses the saved desktop to rearrange your windows.

Menu Bars

Depending on the task you select, C•A•T uses different menu bars of menus.

The first three menus of every menu bar are always the same.

When you choose a command from New, Open, or Windows, the remaining menus change to one of three menu bars.



Base menus

- **File Menu**
New, Open, Save, Save as, Input From Disk, Output to Disk, Print, Page Setup, Label Setup, and Quit.
- **Edit Menu**
Undo, Cut, Copy, Paste, Clear, Select All, Duplicate, Records, Find, and Options.
- **Windows Menu**
Desktop, Name List, Document List, Calendar, Activity List, Status, Make View, Merge View, and Clone Documents.

The New and Open submenus list the types of documents that can be created. Name Card captures names and addresses for accounts and contacts. Document lets you create merged text or form documents. Draw Document lets you draw lines, boxes, and text to create a drawing-type document. Text Template lets you create form letters that reference data from the Name Card. Draw Template lets you draw forms using lines, boxes, text, and pictures. The boxes can have references and computations. Report Layout uses the Template window to let you draw reports with rows and columns. Templates and layouts are simply specific uses of the term 'activities'.

Task specific menus

- **Data menu bar**
Views is the custom menu of name lists. C•A•T views can also be lists of documents. Activities is a custom menu of often used activity names. It reduces the steps needed to create documents.
- **Text menu bar**
Format, Font, Style are standard menus like those available with typical word processors. Glossary is a custom menu of often used text blocks.
- **Draw menu bar**
Format, Font, Style are standard menus like those available with typical drawing programs. Library is a custom menu of often used objects.

Chapter 4

Managing Names

C•A•T organizes names using the Name Card. For each card, you can enter the name and address for one account, data for unlimited contacts, and up to 16 pages of notes per account and contact.

Name cards are alphabetized, categorized according to criteria you define, and shown on the Name List window. To create these name lists or views, use the Make View and Merge View commands. C•A•T maintains these views as you enter more names.

This section gives you a step-by-by guide for managing names and creating name lists.

You don't have to read this chapter in any particular order; each topic is independent of the others. When you want to know how to do something, go to the selection that explains that task. There you'll find a brief, general discussion and step-by-step instructions. Read the column for the task you want to perform and follow the steps, reading down the column.

Selecting Name Cards

To find and select name cards, you can:

- type the account or contact name in the search boxes
- select from a list using the next button
- click an account from the Name List
- use combinations of the above.

To select by typing

- Choose Open ▾ Name Card from the File menu.

- Select either the 'Find account' or 'Find contact' search box.

- Start typing a name like Computers or John.

C•A•T searches, selects, and shows matching results in the Name Card.

- If the record you want is not shown, continue typing until the correct record is shown.

You can type the first, last, or nick name for the contact.

The Name Card window displays search results for 'Ben'. The 'Find account' box contains 'Allen & Associates' and the 'Find contact' box contains 'Ben'. The results show contact information for Allen, Benjamin, including address, phone numbers, and a note about his daughters. Below the main card is a list of contacts with checkboxes, names, titles, and phone numbers.

V	P	Name	Title	Phone
<input checked="" type="checkbox"/>		Allen, Benjamin	President & CEO	617-555-6334
<input checked="" type="checkbox"/>		Allen, Roger	Vice-President	617-555-6331
<input checked="" type="checkbox"/>		Axelrod, Alice	Admin. Asst.	Ben's Office
<input checked="" type="checkbox"/>		Di Santini, Cecilia	Dir. of Purchasing	617-555-6102
<input checked="" type="checkbox"/>		Lawrence, Nancy	Receptionist	Main number

To select using the next button

- Activate the Name Card.
- Click the next button to the right of the 'Find account' box.

If you click the bottom half, C•A•T selects and shows the next account from the Name List window. If you click the upper half, C•A•T selects the prior account.

On extended keyboards, you can press the PageUp and PageDown keys to get the same result.

On normal keyboards, you can press ⌘-UpArrow and ⌘-DownArrow.

Double-clicking the top half of the next button selects the first account on the Name List. And double-clicking the bottom half selects the last.

If the search box contains no text, clicking the next button selects accounts in sequence from the Name List.

To select from a different list, choose a view from the Views menu or choose Make View from the Windows menu to create a new view.

To select by word

- Activate the Name Card.

For example, click any part of the Name Card window or choose Open ▾ Name Card from the File menu.

- Select either the 'Find account' or 'Find contact' search box.

- Type a name like Computers or John.

C•A•T searches and selects the first match in the Name Card.

- Click the next button to the right of the box.

C•A•T searches and selects the next record that matches the word.

C•A•T only selects names that start with the word you type.

You can type the first, last, or nick name for contacts.

To select by clicking

- Choose Name List from the Windows menu.

C•A•T opens the Name List. You can also click any part of the Name List window or choose a view from the Views menu.

The Active Clients window displays a list of clients with columns for Account, City, and State. The list includes Alderson-Maxwell, Inc., Allen & Associates, Brookside Hospital, Cureña Security Service, and Edwards Aerospace Corp.

W	V	P	Account	City	St
<input checked="" type="checkbox"/>			Alderson-Maxwell, Inc.	Anchorage	AK
<input checked="" type="checkbox"/>			Allen & Associates	Milford	MA
<input checked="" type="checkbox"/>			Brookside Hospital	Williamsport	PA
<input checked="" type="checkbox"/>			Cureña Security Service	Tucson	AZ
<input checked="" type="checkbox"/>			Edwards Aerospace Corp.	Milford	OR

- Use the scroll bar to locate the record you want in the alphabetical Name List.

You can also choose a view from the Views menu or choose the Make View command to create a view. See 'Make View' later in this chapter.

- Double-click the account you want.

C•A•T opens the Name Card window and shows the data for the selected record.

The Insertion Point

Changes to text are made at the current insertion point. The **insertion point** is marked by:

- a flashing vertical bar
- a selection of characters displayed in reverse.

You can select the insertion point using a variety of mouse and keyboard techniques.

The next character typed from the keyboard deletes the selected characters and inserts the new characters at the insertion point.

Click to move

- Click to select the insertion point.

On the Name Card, clicking the mouse selects the box you wish to change and selects the insertion point for the text within that box.

Double-click a word

- Double-click any part of a word.

When you double-click on any changeable text, C•A•T selects the underlying word as the next selection point by displaying the word in reverse. The next character you enter from the keyboard then replaces the selected word.

Drag select

- Select the insertion point at the beginning of the text you wish to select.
- Drag to the end of the text; then release the mouse button.

The range of text is selected and reversed.

Shift-click select

- Select something by clicking or dragging.
- Hold down the Shift key and click to extend the selection.

The new range of text is selected and reversed.

Keyboard selections

- To move from one box to the next, press the tab key.

All the text in the next box is automatically selected and reversed. Any new entry from the keyboard replaces the selected text.

The Return key should not be used to move from one box to another. The Return key is used in entry boxes that allow multiple-line entries.

- You can use the arrow keys to change the insertion point. Pressing the left and right arrow keys moves the insertion point by one character. Pressing the up and down arrows moves the insertion point from one box to the next.

Editing Text

You can enter and edit any text in the boxes of the Name Card.

For each change, select an insertion point or the text to change; then replace the text with characters typed from the keyboard.

To insert text

- Click to select the insertion point.
- Type to add text at the insertion point.

To remove text

- Select the text you wish to remove.
- Press the Backspace or Delete key. Or choose Clear from the Edit menu.

Also, you can click to select the insertion point immediately to the right of the characters you wish to replace. Then press the Delete key to remove unwanted characters.

The Clipboard

When you cut or copy text, C•A•T moves the text to a holding area called the Clipboard. This text can then be pasted to a different location.

You can choose the Cut, Copy, and Paste commands to make changes that would otherwise require too much typing.

To move text

- Select the text you wish to move by dragging across the text.
- Choose Cut from the Edit menu.
- Select the insertion point by clicking where you want the text to go.
- Choose Paste from the Edit menu.

To copy text

- Select the text you wish to copy by dragging across the text.
- Choose Copy from the Edit menu.
- Select the insertion point by clicking where you want the text to go.
- Choose Paste from the Edit menu.

Managing Name Cards

The Name Card has account and contact data. The account side on the left captures data for the company. The contact side on the right captures data for specific individuals in the company.

If the contact is a personal contact with no company name, delete the company name text and proceed to enter the remaining data. This contact will be automatically sorted by the person's last name.

Use -, /, or () to separate parts of the phone number.

Use the note field to record additional data like home phone numbers, home addresses, FAX numbers, etc.

The 'Acct #', 'User 1', and 'User 2' fields can be used for any purpose. For example, define 'User 1' to mean AppleLink ID's or FAX numbers.

To enter new name cards

- Choose New ♦ Name Card from the File menu.

If the Name Card is already active, then click New to set up the Name Card for a new entry.

- Replace the text in each box with the new name and address information. Complete the right side contact information with the first contact at this account.

As you tab to the next box, note that all text is selected waiting for your next keystroke to replace the contents.

- When all entries are complete, click Enter.

C•A•T puts your new data away and grays Enter.

If you wish to enter another record, click New and continue.

If you are entering lots of names and the data is available in electronic format, see 'Importing & Exporting' in Chapter 9.

To change a name card

- Choose Open ♦ Name Card from the File menu.

- Select the name card to change.

- To select a different contact, click the contact from the list at the bottom.

- Replace the text in each box with the new name and address information.

- When changes are complete, click the Enter button.

C•A•T puts the changes away and grays the Enter button.

If you make changes to the data for multiple contacts at one account, click Enter after changing the data for each contact.

To delete an account

- Choose Open ♦ Name Card from the File menu.

- Select the name card to delete.

- Click the Delete button.

After a confirmation dialog, C•A•T deletes this record.

If you deleted by mistake, use the Quit command without saving the changes to disk.

If you have already used the Save command, then you must resort to backup copies of your file to recover the lost information.

To add a contact

- Choose Open ♦ Name Card from the File menu.

- Select the name card of the account for this new contact.

- Click New Contact.

- Complete the right side with the new contact information.

- When entries are complete, click the Enter button.

C•A•T puts the changes away and grays the Enter button. The new contact is listed at the bottom of the Name Card.

To delete a contact

- Choose Open ♦ Name Card from the File menu.

- Select the name card of the contact to delete.

- Click Del Contact.

After the confirmation dialog, C•A•T deletes this record.

The screenshot shows the 'Name Card' window with two main sections: 'Find account' on the left and 'Find contact' on the right. The 'Find account' section includes fields for 'Company Name (TAB to next box)', 'Street Address (RETURN for multi-lined addresses)', 'City', 'State', 'Zip', 'Phone #', and 'Acct #'. The 'Find contact' section includes fields for 'Last Name, First Name', 'Title', 'Dear First-name', 'Nick Name', 'Extension #', 'Mail Stop', 'User 1', and 'User 2'. Below these sections are two large text areas for notes, each with a scroll bar and a 'Up to 16 pages of Notes for this Account; and unlimited searchable (Keywords) for categorizing companies.' label. At the bottom, there is a row of buttons: 'Enter', 'New', 'Delete', 'Keywords', 'New Contact', 'Del Contact', and 'Defaults...'. Below the buttons is a table with columns for 'W', 'V', 'P', 'Name', 'Title', and 'Phone'.

When you create new name cards, the text in each box prompts you for the type of data that needs to be entered.

You can change this text to text that is more meaningful to you and save yourself some typing time as well.

For example, if most of your contacts are in California and in the same zip code, change the default settings so that this information need not be entered every time.

To set defaults:

..... Choose Name Card from the New submenu.

Replace the text in each box with the new default text.

When entries are complete, click Defaults.

This information is saved and automatically inserted for new name cards.

Keywords

C•A•T lets you search through the words in the notes areas. You can type words and phrases into the notes areas to categorize your accounts and contacts.

For example, if you type:

Joe is a golf buddy from college.

You can search for 'golf', 'buddy', or 'college' to create lists of names.

Keyword format

To allow explicit keyword search, use {} to bracket words. For example, the previous text can be typed as follows:

```
{golf} {buddy} from  
{college}
```

This keyword format allows faster, more precise searches by searching only the keywords in brackets.

To search using keywords, see 'Make View' later in this chapter.

To reference keywords

To allow references of keywords from templates, type the keyword preceded by a keyname. For example:

```
{hobby=golf}  
{3=Vendor}  
{FAX=555-1212}
```

You can use this format to add custom fields to the Name Card for special uses like home addresses, Apple-Link ID's, home phone numbers, etc.

For use of references, see Chapter 5 of this manual, the Word Processing Manual, and the Form Processing Manual.

The Name Card window displays contact information for Allen & Associates. It includes fields for Find account, Find contact, and a list of contacts. The contact list shows names, titles, and phone numbers.

V	P	Name	Title	Phone
✓		Allen, Benjamin	President & CEO	617-555-6334
✓		Allen, Roger	Vice-President	617-555-6331
✓		Axelrod, Alice	Admin. Asst.	Ben's Office
✓		Di Santini, Cecilia	Dir. of Purchasing	617-555-6102
✓		Lawrence, Nancy	Receptionist	Main number

To paste keywords from a list

You can paste keywords from lists that you create.

To paste keywords:

- Click the Keyword button on the Name Card.

The keyword dialog allows you to create 11 lists of predefined keywords and paste keywords into either the notes for the selected account or contact.

- Select either the account or contact radio buttons.

C•A•T shows the current text from the Name Card.

- Select one of the 11 numbered lists.
- Choose a keyword from the pop-up menu.
- Click Paste keyword.

Keywords are added to the notes using the {keyname=keyword} format.

- When you've finished pasting keywords, click OK.

The new notes replace the notes in the Name Card.

To add a keyword to a list

- Click the Keyword button on the Name Card.

The keyword dialog allows you to create 11 lists of keywords.

- Select one of the 11 numbered lists.
- Click New to add a new keyword to the list.
- Click OK when done.

To change a keyword

- Click the Keyword button on the Name Card.

The keyword dialog allows you to manage 11 lists of keywords.

- Select one of the 11 numbered lists. Click Edit if you want to change the keyname for the list.
- Choose a keyword from the pop-up menu.
- Click Replace to change the keyword. Click Delete to remove the keyword from the list.
- Click OK when done.

The Paste Keywords dialog box shows options for pasting keywords into a list. It includes radio buttons for Account and Contact, a list of 11 numbered lists, and buttons for Paste keyword, Edit, New, Replace, and Delete.

The Name List

The Name List displays accounts alphabetically.

For each account, it shows the account name, city, and state. Use the city and state to differentiate accounts with the same name (e.g., branch offices of the same company).

You can select the accounts to show by checking the three boxes at the left and checkmarking the columns below them.

- If all three boxes are unchecked, then the Name List shows all accounts.
- If one or more boxes are checked, then only accounts with checkmarks in the checked columns are shown.

You can also select the accounts to show by choosing a saved view from the Views menu.

Work column of checkmarks

When you enter a change, C•A•T adds the work checkmark.

When you use the Save command, C•A•T removes all work checkmarks.

To show all accounts that have been changed since the last Save:

- Check the work box and uncheck the other boxes.

C•A•T shows all accounts that have checkmarks in the work column.

The name of the selected view is shown in the title bar. Note that the accounts shown depend on which of the three boxes are checked.

W	V	P	Account	City	St
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Alderson-Maxwell, Inc.	Anchorage	AK
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Allen & Associates	Millford	MA
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Breitmeier & Schumann	Odessa	TX
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Brookside Hospital	Williamsport	PA

View column of checkmarks

This column shows the checkmarks for the selected view.

You can have 13 saved views. You select a view by choosing one from the Views menu.

You can add checkmarks to a view column by:

- clicking with the mouse to checkmark and uncheckmark accounts
- choosing Make View from the Windows menu
- choosing Merge View from the Windows menu.

To show accounts for a view:

- Choose a view from the Views menu.

C•A•T shows all accounts that have checkmarks in the view column.

Each contact on the Name Card also have columns for the work, view, and priority checkmarks. For some print operations, you need to checkmark each contact—not just the account.

Priority column of checkmarks

Priority is an extra column that you can use for any purpose. You add and delete checkmarks by clicking accounts.

For example, if you want to print labels or merged documents for only two accounts in a view that has many:

- Choose the view from the Views menu.
- Checkmark only the two accounts you want in the priority column.
- Check the priority box.

The Name List shows just the two accounts that have checkmarks in the view and priority columns.

You may want to also checkmark the priority column on the Name Card window for each specific contact that you want.

Using name lists

You select a list of names to:

- find, select, and open specific name cards
- print mailing labels, envelopes, merged documents, and list-type reports
- create a tele-marketing list
- export or publish a list of names
- delete many accounts at one time.

To delete many accounts

- Select the list of names to delete.
- Choose Delete Records from the Edit ▾ Records submenu.

A dialog warns you that all linked contacts and documents will be deleted as well.

- Click OK or Cancel.

If you deleted by mistake, use the Quit command without saving the changes to disk.

If you have already used the Save command, then you must resort to backup copies of your file to recover the deleted information.

W	V	P	Account	City	St
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Alderson-Maxwell, Inc.	Anchorage	AK
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Allen & Associates	Millford	MA
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Brookside Hospital	Williamsport	PA
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Cureña Security Service	Tucson	AZ
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Edwards Aerospace Corp.	Medford	OR

The number of accounts shown is in the box to the right. If you see fewer accounts than indicated by the number, check the scroll bar—you may be viewing only the end of the list.

Make View

The Make View command does the following:

- lets you enter search criterias to find one, many, or all name cards
- searches through every name card and checkmarks the view column for each account and contact that satisfies the criteria
- shows the result in the Name List window.

The criteria for making the view are saved so that you can quickly retrieve saved views.

Also, as you add or change name cards, C•A•T automatically checks to see if checkmarks should be added to those name cards.

You can change the criteria of a view and reuse it—at any time.

To make a view

- Choose a view from the Views menu. For new users, they are numbered from 1 to 13.
- Choose Make View from the Windows menu.

- Enter a name for the view.
- Enter search criteria.
- Click Search.

C•A•T shows the results on the Name List.

Use views to create logical groupings of your contacts, such as Customers, Friends, Prospects, Investors, Press, Beta Users, Seminar Attendees, Members, SIG members, etc.

You create, save, and have C•A•T automatically update views to keep them up-to-date and easily accessible.

The top seven boxes let you enter criteria for account data.

If you only enter criteria in those boxes, your view will include any accounts meeting your criteria and every contact at those accounts.

The Title and cKeywrd boxes let you enter criteria for the contact data.

If you only enter criteria in those boxes, your view will include any contacts meeting your criteria and their accounts.

The bottom two boxes let you search by date. For example, enter '>1/1' to find all Name Cards created since the beginning of the year.

To type the criteria

When you type the criteria, C•A•T finds name cards with a value in the same field that begin with or match what you typed. This let you type just a few letters instead of full names.

For example, if you typed 'com', values starting with words like 'communications' and 'computers' would match, but the word 'intercom' would not.

C•A•T ignores capitalization when comparing text.

If a criterion is several words like 'new york', the values from name cards must match every character

To use operators

You can type operators before the text of your criteria.

For example, if you typed '<com', then words that are alphabetically less than 'com' would not match. 'Communications' and 'computers' would not match, but 'abc' would.

- To insert an operator, type the operator or click the icon you want.

The available operators are:

=	=ABC	Exactly equal to ABC
>	>ABC	Alphabetically greater than ABC
<	<ABC	Alphabetically less than ABC
>=	>=ABC	Alphabetically greater than or equal to ABC
<=	<=ABC	Alphabetically less than or equal to ABC
?	?ABC	Contains the letters ABC

To find a range of values

You can find values in an alphabetical range.

For example, if you typed 'a..m' in the state box, then name cards with states from a through m would match.

If you typed '7..9' in the zip code box, then name cards with one digit zips of 7, 8, and 9 would match.

- To insert a range, type two periods between the first and last value you want.

To negate the criteria

You can negate the criteria.

For example, if you typed '=com', values starting with words like 'communications' and 'computers' would not match, and values that don't start with 'com' would.

- To negate the criteria, type a / or click the / icon and insert it before all other operators.

To use a compound operator

You can type compound operators between criteria.

For example, if you typed 'CA|OR|WA' in the state box, then name cards with states that start with CA, OR, or WA all match.

- To insert a compound operator, type the operator or click the icon you want.

The available operators are:

- A|B|C Starts with A or B or C
- <D>X Less than D or greater than X
- A&?B Starts with A and does not contain a B

You cannot combine multiple range operators (..) using compound operators.

To find empty boxes

If you type the = operator with no other criteria, then C*A*T selects any name card that is missing a value in that box.

- For example, type an = in the zip code box to find all name cards that are missing zip codes.

The criteria below instruct that:

- the account name must begin with AL and
- it cannot contain the letter X.

Two accounts meet the first criterion. The second criterion excludes the first account and thus it is not checkmarked.

Enter criteria; Click Search.

View

Account

City

State

Zip Code

Phone#

Account#

Keyword

☐ Work/View/Priority

W	V	P	Account	City
			Alderson-Maxwell, Inc.	Anchorage
✓			Allen & Associates	Milford
			Breitmeier & Schumann	Odessa

To search for keywords

You can search for accounts and contacts that contain a certain (keyword). When you type the criteria, don't type the brackets {}.

- If the keyword is in the account notes of the Name Card, enter the criteria in the box labeled Keyword.
- If the keyword is in the contact notes of the Name Card, enter the criteria in the box labeled cKeywrd.
- If the keyword format includes a keyname, then enter 'keyname=keyword' as the criteria.

For example, to find all fax numbers that start with '555,' enter:

FAX=555

When C*A*T searches using the keyword criteria, it only checks words in brackets. If you want C*A*T to check all words, check the All words box.

You can click the Keyword button to paste keyword criteria from your keyword lists.

To search all words

To search through all the words in the notes area regardless of whether they were entered using the (keyword format):

- Enter the criteria in one of the keyword boxes.
- Check the All words box.

To select by date

You can select accounts using the date of creation and the date last modified.

- Select the boxes at the bottom of the dialog.
- Type the date as digits separated by a / such as 9/21.

You can add operators and modifiers to produce ranges of dates. For example:

>=1/1 on or before 1/1

1/1..1/55 1/1 through 1/15

/3/12/89 not on 3/12/1989

Omit the year or month to mean the current year or month.

These criteria would find any accounts that has at least one contact with the word 'golf' in the contact notes. Because All words is checked the word 'golf' need not be in brackets {} in the notes area.

Account#

Keyword

Title

cKeywrd

Date

☒ All words

Merge Views

The Merge View command lets you combine views using the **current** view (i.e. V column) and the **work** view (i.e. W column.)

You can also select the current **document** list to create a view that contains all the contacts from a list of documents.

The merge modes let you:

- copy the checkmarks from one view to another
- merge the checkmarks from two views
- find the common checkmarks between two views
- remove common checkmarks of one view from another.

Experiment with Merge View to try different combinations. The best way to learn is by doing.

To copy the current view to the work view or vice versa

- Choose a view from the Views menu.
- Choose Merge Views from the Windows menu.

The dialog below appears.

- Select Set and Work <= Current.

If you want to save the work view as the current view, select Current <= Work instead.

- Click OK.

The checkmarks for the view column are copied to the work column or vice versa depending on the operation you selected.

To make a document list into a view

- Select and show the documents on the Document List window. For example, choose a document view from the Views menu.

- Choose a view from the Views menu.

- Choose Merge Views from the Windows menu.

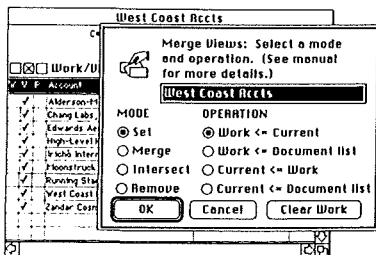
The dialog below appears.

- Select Set and Current <= Document List.

If you want to copy the list to the work view, select Work <= Document List instead.

- Click OK.

C•A•T adds a checkmark to the selected contact and account of each document.



Clicking OK would copy the view called "West Coast Accis" from the View (Current) column to the Work column at its left. Any checkmarks currently in that column would be removed.

To merge two views

- Choose the first view from the Views menu.
- Choose Merge Views from the Windows menu.
- Select Set and Work <= Current; and click OK.

The checkmarks for the view column are copied to the work column.

- Choose the destination view from the Views menu.
- Choose Merge Views from the Windows menu.
- Select Merge and Current <= Work; and click OK.

The merge mode added a checkmark to the destination view if either the work or current view has a checkmark.

You can also use a list of documents to merge two views.

To intersect the document list and the work view

- Select and show the documents on the Document List window. For example the list might include all your mailings from last week.
- Choose Merge Views from the Windows menu.
- Select Intersect and Work <= Document List; and click OK.

The intersect mode removed checkmarks from contacts and accounts if no documents from the Document List are linked to that contact.

In other words, the target view only shows checkmarks if both views have the selected contact.

If you choose to intersect the current and work views, the result would be exactly the same as if you checked both the W and V boxes on the Name Card.

To remove common members of two views

- Choose the first view from the Views menu.
- Choose Merge Views from the Windows menu.
- Select Set and Work <= Current; and click OK.

The checkmarks for the view column are copied to the work column.

- Choose the destination view from the Views menu.
- Choose Merge Views from the Windows menu.
- Select Remove and Current <= Work; and click OK.

The remove mode removed any checkmarks from the current view, if the work view for the same record is checkmarked.

You can also remove a list of documents from a view. For example, if the view shows whom you need to call and the document list shows phone messages for people you have called, selecting Remove and Current <= Document List would show the remaining names to call.

A vertical spiral binding runs down the center of the page, consisting of a series of black rings connected by a thin wire.

Chapter 5

Working with Templates

C•A•T lets you define unlimited number of templates. Templates can be used to create form letters, capture data, produce forms, analyze data, print reports, or do other functions.

This chapter shows you how to create and work with templates. For step-by-step instructions on editing the text of text templates, see the Word Processing Manual. For step-by-step instructions on editing objects of draw templates, see the Form Processing Manual.

You don't have to read this chapter in any particular order; each topic is independent of the others. When you want to know how to do something, go to the selection that explains that task. There you'll find a brief, general discussion and step-by-step instructions. Read the column for the task you want to perform and follow the steps, reading down the column.

Template Types

Templates and report layouts are specific uses of the term **activities**.

Through out this manual, the word **activity** is used if the task described relates to filling; and **template** is used if the task relates to creating merged documents.

You can create two types of templates:

- Text Template—used for form letters or form contracts.
- Draw Template—used for graphic forms and report layouts.

Templates are organized and filed in C•A•T by activity name and class.

Text template

A text template contains preset text and format.

- Use the word processing features of C•A•T to create, edit, and format the text.
- The text can contain references to name and address data from the Name Card for merged documents.

For step-by-step instructions on editing templates, see the Word Processing Manual.

Use a text template to create form letters, boilerplate contracts, and other text-based templates.

You can also create a text template containing no preset text. This template, when selected, supplies no text to the merged document and is used simply to categorize the document for filing purposes.

For example, you can choose Text Template from the New submenu and type just a name for the activity such as 'Good ideas' or 'To-do

Draw template

A draw template contains lines, boxes, and text.

- Use the drawing features of C•A•T to create, edit, and format the objects.
- Boxes may contain references to name and address data from the Name Card.
- Boxes may also contain formulas for simple math, array math, summations, text manipulation, and special functions.
- Boxes may also contain references to named keywords and boxes from other templates.

For step-by-step instructions on editing templates, see the Form Processing Manual.

You can use a draw template to create forms, message pads, calendars, dossiers, surveys, and other graphic-based templates.

Report layout

Draw templates can also be used to create report layouts that print reports with multiple rows and columns.

When you choose Report Layout from the New or Open submenus, the Template window is opened to let you draw the layout.

- The report layout is lines, boxes, and text you draw.
- Use references to select the data to print.
- You can supply background objects like titles, footers, and logos.
- Reports can be printed with multiple rows and columns.
- Records can be sorted prior to printing.

You can use these report layouts to design columnar reports, multi-column layouts, and other reports.

Filling templates

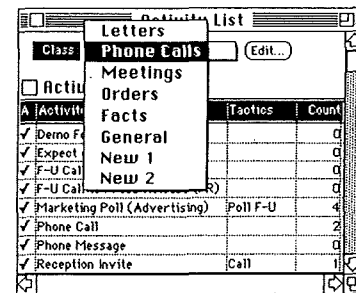
Templates are categorized into 8 **activity classes** and filed alphabetically by name.

For each template, type the name in the Activity name box and choose a class from the pop-up menu on the Template window.

The list of templates you've created is shown on the Activity List window by class and alphabetized by name.

To edit class names

- Choose Activity List from the Windows menu.
- Choose the class name to edit from the pop-up menu.
- Click Edit.
- Type the new name and click OK.



The active checkmarks can be checked and unchecked.

If you click the Active checkbox, C•A•T only shows templates that are checked.

Use the checkmarks and the Active checkbox to select the list of templates to export, or to select documents when you want selected documents by class of templates.

Selecting Templates

To select by typing

To find, select, and open templates, you can:

- type in the search box
- select from a list using next
- click or double-click from the Activity List
- use combinations of the above.

You can use the selected templates to:

- create merged documents
- merge print with a list of names
- list print to produce columnar reports.

- Choose Open ▾ Draw Template from the File menu. You could also choose Text Template.

C•A•T opens the template window. The insertion point is in the search box at the top left.

- Type the name of the template by name.

As you type, C•A•T searches and selects possible results for the window.

- If the template you want is not shown, continue typing.

To select using the next button

- Choose Open ▾ Draw Template from the File menu. You could also choose Text Template.

- Click the next button at the top left.

If you click the bottom half, C•A•T selects and shows the next template from the Activity List window. If you click the upper half, C•A•T selects the prior template.

On extended keyboards, you can press the PageUp and PageDown keys to get the same result.

On normal keyboards, you can press the ⌘-UpArrow and ⌘-DownArrow keys.

Double-clicking the top half of the next button selects the first template on the Activity List. And double-clicking the bottom half selects the last.

The Activity List organizes templates by activity class. When you click the next button, C•A•T selects by a single class. Activate the Activity List to choose another activity class from the pop-up menu.

To select by word

- Choose Open ▾ Draw Template from the File menu. You could also choose Text Template.

- Type the first word of a template name.

C•A•T searches, selects, and opens the first match in the Template window.

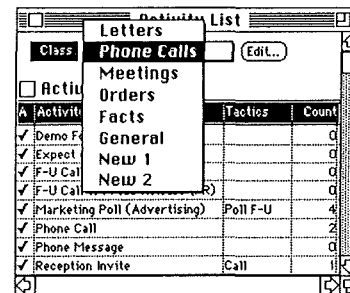
- Click the next button to the right of the box.

C•A•T searches and selects the next record that matches the word.

C•A•T only selects names that start with the word you type.

To select by clicking

- Choose Activity List from the Windows menu.

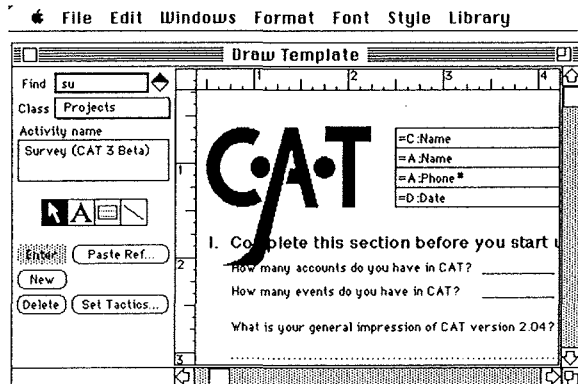


- Use the pop-up menu of activity classes to locate the template you want.

- Double-click the template.

C•A•T opens the Template window and shows the selected template.

Single-click to select a template. For example, you can select a template for use with merge or list print.



Managing Templates

The Template window is used to create, change, and manage draw and text templates—including report layouts.

Templates are filed by activity class and name.

The left side of the window has boxes for choosing the activity class and entering the name.

The right side is the template area.

To create templates

- Choose New ▸ Draw Template, Text Template, or Report Layout from the File menu.

C•A•T opens the Template window.

- Choose an activity class from the pop-up menu on the left.
- Type a name for the template.
- Create your template on the right side.
- When done, click Enter.

C•A•T files your new template and grays Enter.

If you wish to create another template, click New.

To duplicate templates

- Find and open the template you wish to duplicate.

- Choose Select All from the Edit menu (or press ⌘-A).

- Choose Copy from the Edit menu (or press ⌘-C).

- Click New to set up the new template.

- Type a name for the template.

- For text templates, select the insertion point on the text area to the right.

- Choose Paste from the Edit menu (or press ⌘-V).

- Make any changes to the template.

- When done, click Enter.

C•A•T files the new template and grays Enter.

To delete templates

- Find and open the template you wish to delete.

- Click the Delete button.

After a confirmation dialog, C•A•T deletes this record.

If you deleted by mistake, use the Quit command without saving the changes to disk.

If you have already used the Save command, then you must resort to backup copies of your file to recover the deleted information.

To change the activity class

- Find and open the template you wish to change.

- Choose the new activity class from the pop-up menu on the left.

- Click Enter.

The template is changed and filed using the new activity class.

To print templates

- Find and open the template you wish to print.

- Choose Print from the File menu.

C•A•T shows a dialog of print choices.

- Check One Document.

- Click Print.

The Custom Activities Menu

The Activities menu is your custom menu of often used templates.

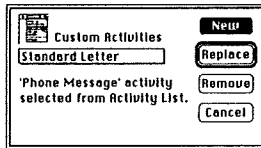
Choose Set Menu to add, replace, or remove items from the menu.

You can choose an item from the Activities menu to create merged documents.

Use the Activities menu to customize C•A•T to handle your daily tasks.

To add a menu item

- Choose Activity List from the Windows menu.
- Select a template.
- Choose Set Menu from the Activities menu.



The custom menu dialog shows a pop-up menu of existing items and buttons for making changes.

- Click New.
- C•A•T shows a dialog for capturing the new menu item name.
- Type the name for the new menu item and click OK.

The new menu item is added to the Activities menu.

To change a menu item

- Choose Activity List from the Windows menu.
- Select a template.
- Choose Set Menu from the Activities menu.

C•A•T shows the custom menu dialog.

- Choose the menu item to replace from the pop-up menu.
- Click Replace.
- Type the new name for the menu item and click OK.

The new menu item replaces the prior entry in your custom menu.

To remove a menu item

- Choose Set Menu from the Activities menu.

C•A•T shows a dialog for managing custom menus.

- Choose the menu item to remove from the pop-up menu.

- Click Remove.

C•A•T shows a dialog to confirm the action.

- Click OK.

The menu item is removed from your custom menu.

To use the Activities menu

- Choose Open ♦ Name Card from the File menu.

C•A•T opens the Name Card.

- Select any contact.

- Choose the template from the Activities menu.

C•A•T opens the Document window and shows the merged document.

- Type to complete the document.

- Click Enter.

C•A•T files the document and grays Enter.

About References

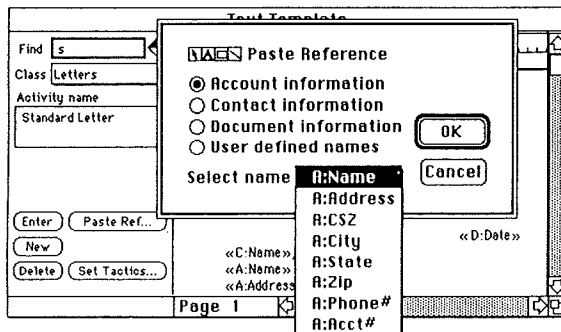
Templates can contain references to data located on Name Cards.

A reference is text such as 'A:Name' that instructs C•A•T to retrieve data when the template is used to create a document.

The Paste Ref button on the Template window lets you insert references. It shows 3 lists of references:

- account-related data
- contact-related data
- document-related data.

After you choose an item from Paste Ref pop-up menu, the reference is pasted at the insertion



To refer to account data

You can refer to the following account data from the Name Card.

A:Name—account name
A:Address—street address
A:CSZ—city, state zip code
A:City—the city
A:State—the state
A:Zip—the zip code
A:Phone#—phone number
A:Acct#—account number
A:Note—all the text in the note box.

You can also reference named-keywords typed in the notes. To reference an account keyword, type 'A:keyword'.

To refer to contact data

You can refer to the following contact data from the Name Card.

C:Last—last name
C:First—first name
C:Name—full name
C:Ext#—phone extension
C:Title—contact's title
C:Nickname—nickname or alias
C:Mailstop—corporate mailstop
C:User1 and **C:User2**—two optional boxes
C:Salutation—the salutation including 'Dear —.'
C:Note—all the text in the note box.

You can also reference named-keywords typed in the notes.

To reference a contact keyword, type 'C:keyword'.

See 'Keywords' in Chapter 4.

To refer to document data

You can refer to the following data from the left side boxes of the Document window:

D:Date—the date

D:Time—the time

D:Amount—the amount from the box next to the calculator icon

D:Today—today's date from the Macintosh clock

D:Prior—meaningful only if the template uses tactics. It refers to the date from the trigger document (i.e. the one that created the current follow-up document).

For example, the follow-up template could include: 'We last talked on «D:Prior»'.

D:Prior refers to the phone call document that triggered this follow-up document.

D:tName—template name

D:Rate—rate box for the selected template.

About references

For examples of the use of references, see Chapter 2 in this manual, the Word Processing Manual, and the Form Processing Manual.

Tactics allow you to automate **follow-up activities**. For example, whenever you send a business proposal, a follow-up call is scheduled a week later.

Each activity can be either a draw or text template.

Every activity can **trigger** up to four other activities with preset delays.

To set tactics, you need to first create all the activities—both the trigger and follow-up activities.

- Select and open the trigger activity or template.

In the example below, the 'Cold Letter' is the trigger activity and will be followed by a follow-up call seven days later.

- Click Set Tactics.

C•A•T opens the Tactics window.

- Select Days and type the number of days by which the follow-up activity should follow its trigger activity.

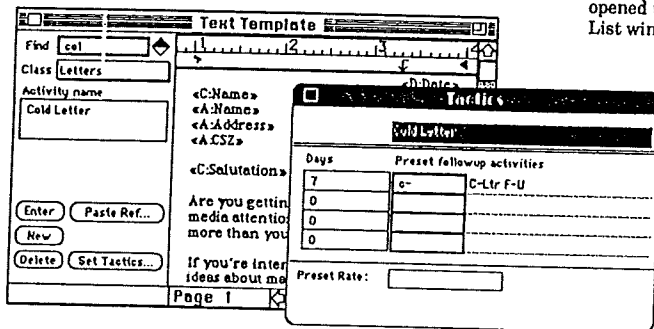
- Select the search box and select the follow-up activity.

You can select the follow-up activity by typing the name or selecting it from the Activity List window. See 'Selecting Templates' in this chapter.

- Click the close box; then click Enter on the Template window.

When the trigger activity is used to create a merged document, C•A•T automatically creates each follow-up activity as a merged document.

These follow-up documents can be found, selected, and opened using the Document List window.



The follow-up activity can precede the trigger. For example, you can have an appointment automatically trigger a confirmation call one day prior by entering -1.

You can use C•A•T to track billable time. The Tactics window on the prior page has a box for a billable rate.

You can type a billing rate into this box. Activities that have non-zero rates mean that the activity is billable and should be tracked for time.

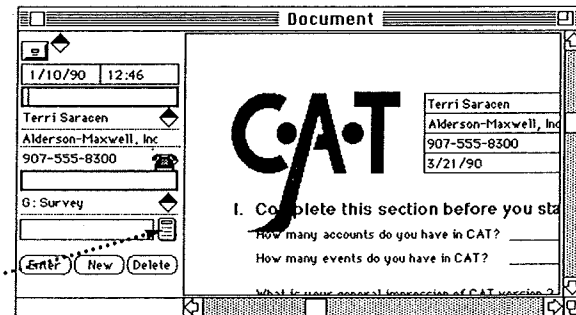
When you create a document using an activity that is billable, C•A•T automatically tracks elapsed time in minutes.

The starting time is the time entered at the top left of the Document window.

When you click Enter or the calculator icon, C•A•T computes and updates the elapsed time in the **amount** box next to the calculator.

You can reference both the amount and rate box using D:Amount and D:Rate, respectively as references in text or draw templates.

You can create templates to produce billing reports. See the Form Processing Manual under Reference Many.



If the selected template is billable, clicking the calculator icon updates the elapsed time in the amount box.

A vertical spiral binding runs down the center of the page, consisting of a series of black rings connected by a thin wire.

Chapter 6

Creating Documents

This chapter shows you how to create documents. For step-by-step instructions on editing text documents, see the Word Processing Manual. For step-by-step instructions on drawing documents, see the Form Processing Manual.

You don't have to read this chapter in any particular order; each topic is independent of the others. When you want to know how to do something, go to the selection that explains that task. There you'll find a brief, general discussion and step-by-step instructions. Read the column for the task you want to perform and follow the steps, reading down the column.

Document Types

You can create three types of documents:

- merged text document
- merged form document
- draw document.

All documents are filed by contact, activity, and time.

Merged text document

A merged text document merges the text of the selected **text template** and the data of the selected name card.

You can use the word processing features of C•A•T to edit and format the text.

For step-by-step instructions on editing, see the Word Processing Manual.

Merged text documents can be letters, contracts, and other text-based documents.

If the selected template contains no preset text, the merged document is blank. You can type any note or message.

In such cases, the selected template is used just to categorize the document for filing purposes.

For example, if the selected template has the name 'To-do sheets', the document would be filed with all your to-do documents.

Merged form document

A merged form document merges the form of the selected **draw template** and the data of the selected name card.

You can use standard Macintosh editing techniques to complete the form.

You cannot edit boxes that show computed results. You complete the input sections of the form and let C•A•T do the computations.

Merged form documents can be any form like order pads, phone messages, calendar pages, dossiers, surveys, and expense reports.

Both text and form type documents are created by choosing Document from the New submenu. The type of document created depends on the type of template you select.

Draw document

You can create documents using the draw tools. The draw document is simply boxes, lines, pictures, and text you draw.

For step-by-step instructions on drawing, see the Form Processing Manual.

To create a draw document, choose Draw Document from the New submenu.

C•A•T opens the Document window, shows the tool box, and changes the menu bar to let you use the draw menus of commands.

Draw documents are also filed by contact, activity, and time.

If the selected activity is a text or draw template, the template text and objects are not used.

The selected template is used to categorize the document for filing purposes.

Filing documents

C•A•T organizes documents like an automated version of the index-card system for books in a library.

For each book, the librarian creates subject, title, and author cards for the index files. Users can then use any of the index files to find the books they want.

C•A•T automatically indexes documents using the selected contact and activity, and the date and time you enter.

You can use contact, activity, or time criteria to find documents. For example, find all documents for one contact.

C•A•T finds *all* matching documents, instantly—even if you have tens of thousands.

Unlike a library, C•A•T is easier, more convenient, faster, more compact, and more flexible.

Filing cabinets

Another analogy is the filing system common to most desks.

You have folders for accounts (i.e., by contacts), projects (i.e., by activities), and chrono-files (i.e., by time) that contain related documents.

If a document needs to be filed three ways, then you create three copies and file documents into each folders.

C•A•T automates the process keeping only one copy; but allowing you to find documents using any combination of criteria.

This chapter shows you how to create documents—one at a time or thousands at a time. The next chapter shows you how to manage documents.

New Documents

The Document window is used to create, change, and manage all types of documents.

The left side of the window has boxes for entering the date and time.

Two search boxes (i.e. the bold boxes) let you select the contact and activity for the merged document.

The right side shows the document.

To create documents

- Choose New ▾ Document from the File menu.

The Document window opens.

- If needed, change the date and time.

- Select the contact search box and select a contact.

- Select the activity search box and select a template.

The merged document shows to the right.

- If you selected a text template, make any text changes. If you selected a draw template, complete the form.

- When done, click Enter.

C•A•T files your document and grays Enter.

If you wish to create another document, click New.

To create a draw document

- Choose New ▾ Draw Document from the File menu.

The Document window opens and the tool box is shown to let you draw.

- If needed, change the date and time.

- Select the contact search box and select a contact for filing this document.

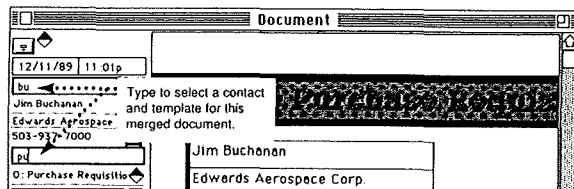
- Select the activity search box and select an activity name for filing this document.

- Draw on the blank page to the right.

- When done, click Enter.

C•A•T files your document and grays Enter.

If you wish to create another draw document, click New.



To quickly create documents

- Choose Open ▾ Name Card from the File menu.

C•A•T opens the Name Card window.

- Select any contact.

- Choose your template from the custom Activities menu.

C•A•T opens the Document window and shows the merged document.

- Complete the document.

- Click Enter.

C•A•T files the document and grays Enter.

To clone documents

You can clone documents—to create one for each name in a name list.

- Display the accounts you want in the Name List.

For example, choose a view from the Views menu or choose Make View from the Windows menu to create a view.

Be sure to select specific contacts to include or exclude for your list.

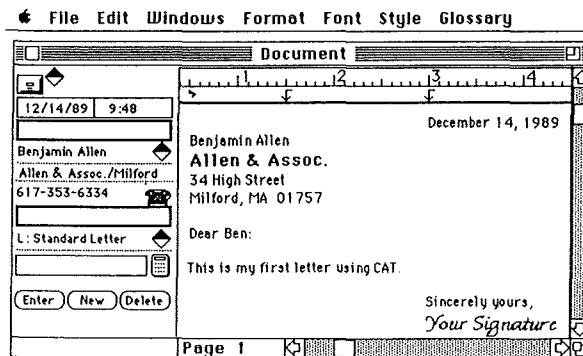
- Create or select the document you want to clone and show it in the Document window.

- Choose Clone Documents from the Windows menu and click OK.

You don't need to clone documents to print merged documents. See Merge Print in the Printing Chapter.

Clone Documents could unnecessarily clutter your file with thousands of documents. Use it as appropriate.

A merged text document for the selected contact.



Date, Time, & Amounts

The left side of the Document window has boxes for a date, time, and amount.

The date and time defaults to the data from the Macintosh clock. You can change the boxes to show any date and time.

They are used to file documents chronologically.

Dates

You can replace the default date or change the date for an existing document by typing, for example:

3/31/90 mm/dd/yy

1/13/1990 mm/dd/yyyy

11-21-90 use dashes

If you omit the month or year, C•A•T assumes that the same month or year should be used for the document. For example:

2/12 Feb 12th of the same year

3 The 3rd day of the same month and year

If you change the date and the merged document has a reference to the date, click the calculator icon to refresh the document.

Time

You can replace the default time or change the time for an existing document by typing, for example:

9:00 9:00AM

1:15 1:15PM

1a 1:00AM

9:30p 9:30PM

14:00 2:00PM

9.15 use period

Add 'a' or 'p' to indicate a.m. or p.m. hours.

Times from 9:00 to 12:59 and 1:00 to 6:59 are assumed to be within office hours. They can be entered without an suffix.

Times from 7:00 to 8:59 are assumed to be p.m. To change it to mean a.m.:

- Choose Options ▶ Preferences from the Edit menu.
- Select 'Early bird' and click OK.

Amount

The amount box to the left of the calculator icon is used to show the billable time that C•A•T automatically computes for billable activities.

You can also enter any amount and use this box for your own specific need.

You can reference the data in this box using D:Amount.

Selecting a Contact

To find and select a contact for a document, you can:

- type in the search box
- select using next
- double-click a name from the Name List
- use combinations of the above.

For each of the options to the right, make sure the contact search box is selected.

To select by typing

- Type the first, last, or nickname of the contact.

As you type, C•A•T searches and selects possible results for the window.

- If the contact you want is not shown, continue typing.

You can type the contact's first name, last name, or nickname. You can also type the full name.

To select using the next button

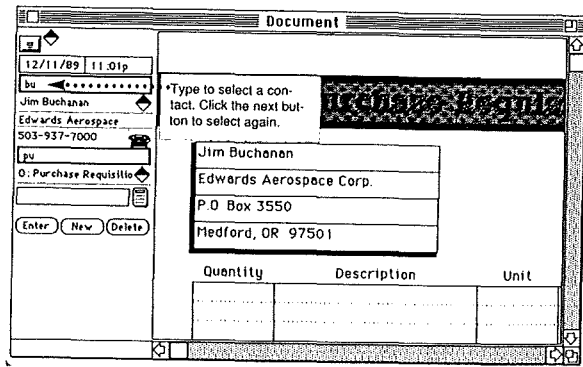
- Type the first, last, or nickname of the contact.

C•A•T searches and selects the first match.

- If the contact you want is not shown, click the next button to the right.

If you click the bottom half of the next button, C•A•T searches and selects the next record that matches the word.

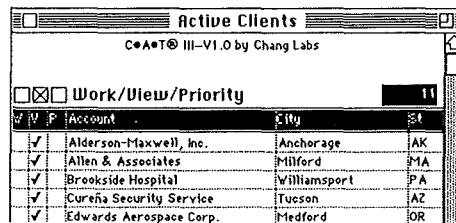
If you click the top half, C•A•T searches and selects the prior record.



To select by clicking

- Choose Name List from the Windows menu.

The Name List opens. To find the account you want, choose views from the views menu, use the scroll bar, or choose Make View from the Windows menu.



- Double-click the account.

The Name Card opens, displaying that account.

- Select the contact you want from the list at the bottom.

- Click to activate the underlying Document window.

If the contact search box is selected, the window shows the contact you selected.

To select by typing the account name

- Choose Open ♦ Name Card from the File menu.

C•A•T opens the Name Card. The account search box is selected.

- Type to select the account by name.

- Select the contact you want from the list at the bottom.

- Click to activate the underlying Document window.

If the contact search box is selected, the window shows the contact you selected.

Selecting a Template

To find and select a template, you can:

- type in the search box
- select using next
- click a template from the Activity List
- use combinations of the above.

For each of the options to the right, make sure the activity search box is selected.

To select by typing

- Type the name of the template by name.
As you type, C•A•T searches and selects possible results for the window.
- If the template you want is not shown, continue typing.

To select using the next button

- Start typing any portion of the template name.
C•A•T searches and selects the first match.
- If the template you want is not shown, click the next button to the right.
If you click the bottom half of the next button, C•A•T searches and selects the next record that matches the word.
If you click the top half, C•A•T searches and selects the prior record.

To select by clicking

- Choose Activity List from the Windows menu.

- Use the pop-up menu of activity classes to locate the template you want.
- Select the template.
- Click to activate the underlying Document window.

If the activity search box is selected, the window shows the merged document.

Completing Merged Form Documents

Text can be typed into any box on a merged form using the same editing techniques as for the Name Card.

Note the following differences:

- If the box has the special Checkbox formula, you can only click to check or uncheck the box.
- If the box contains a computed result, you cannot select the box nor make any direct editing changes.
- If the box contains a reference, the merged data can be changed to allow entry of alternate data.

For example, you can replace the mailing address retrieved from the Name Card with a shipping address.

- You cannot change fonts, sizes, and styles for text in merged forms. To change formatting, open the Template window.

Navigating Windows

From the Document window, you can open other windows.

You can use other windows to change templates or the data in Name Cards; or to select items that you need.

Then activate the Document window to see the results.

Name Card

- Click the contact name below the contact search box.

The Name Card opens and the selected name is shown.

You can make changes, click Enter, and click the close box. The changes instantly update your document.

You can also use the Name Card to find and select a new contact for the document.

Name List

- Click the account name on the second line below the contact search box.

The Name List opens and the selected account is reversed.

You can use the Name List to find and select a new contact for the document.

Activity List

- Click the activity name below the activity search box.

The Activity List opens and the selected activity is reversed.

You can use the Activity List to find and select the activity or template you want.

Template window

- Double-click the activity name below the activity search box.

The Template window opens and the selected template is shown.

You can make changes, click Enter, and click the close box. The changes instantly update your document.

You can also use the Template window to find and select the activity or template you want.

Document List

- Click the file drawer at the upper left.

The Document List opens.

You can use the Document List to find and select the document you want to open.

You also use the Document List to select the list of documents when you create a document that references many documents.

Click the file drawer to open the Document List window.

Click here to open the Name Card.

Click here to open the Name List.

Click here to open the Activity List, double-click to open the Template window.

The screenshot shows a window titled "Document". On the left is a vertical sidebar with a file drawer icon at the top. Below it are several buttons: "bu" (selected), "Jim Buchanan", "Edwards Aerospace", "503-937-7000", "pu", and "Purchase Requisition". At the bottom of the sidebar are "Enter", "New", and "Delete" buttons. The main area of the window displays a contact card for "Jim Buchanan" with the following details: "Edwards Aerospace Corp.", "P.O. Box 3550", and "Medford, OR 97501". Below the contact card is a table with three columns: "Quantity", "Description", and "Unit". The table is currently empty.

When You Click

When you click Enter, C•A•T files your document by contact, activity, and time and grays Enter.

If you changed an existing document, C•A•T refiles the changed document.

Depending on the type of document, C•A•T performs other automatic functions.

Merged forms with formulas

If the selected template is a draw template with formulas, C•A•T refreshes all the computations.

You can also click the **calculator icon** to refresh formulas.

If the address data on the form is different from the current data on the Name Card, clicking the calculator will also refresh references.

For example, since sending a document, the address for the contact has changed. Click the calculator, if you want to refresh the address in the document.

For details on formulas, see the Form Processing Manual.

Referencing many documents

If the selected template is a draw template that references many documents, clicking Enter does not start the retrieval process.

You need to select and display the documents to search on the Document List window. Then click the calculator icon to start the retrieval of data.

When you click Enter, C•A•T then refreshes any computations.

For details on referencing many documents, see the Form Processing Manual.

Template with tactics

If the selected template has tactics, C•A•T creates a document for each follow-up activity.

C•A•T automatically sets the date and selects the activity for each follow-up document as instructed by the tactics.

Each follow-up document then becomes an independent document that is filed by contact, activity, and time.

Template with billable rates

If the selected template has a billable rate entered on the Tactics window, C•A•T computes the elapsed time by subtracting the time in the time box from the current time.

The result is rounded to minutes and shown in the Amount box to the left of the calculator icon.

Auto-create activity

You have the option to create new activities from the Document window.

- First, choose Options ▸ Preferences from the Edit menu.
- Check 'Auto-create activities' and click OK.

On the Document window:

- Type the name of a new activity in the activity search box.
- When you click Enter, C•A•T shows a dialog and asks if the name you typed should be added to the Activity List.

The dialog has eight buttons to show the activity classes.

- Click an activity class.

The activity will be filed using the selected name and class.

Autodial

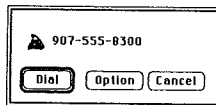
From the Document window, you can use C•A•T to dial the phone number for the selected contact.

C•A•T works directly with phone sets that accept tone dial (i.e. not digital dial like most PBX systems) and indirectly through many modems that can autodial.

To dial



- Choose New ▾ Document from the File menu.
- Select any contact.
- Click the telephone icon.



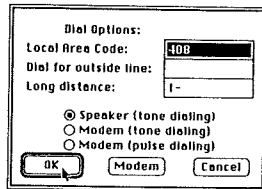
A dial dialog shows the number to dial.

- Select a line on your phone set and click Dial.

Hyphens, parentheses, and spaces may be used within phone numbers. They are ignored when dialing.

To set dial options

- Choose New ▾ Document from the File menu.
- Select any contact.
- Click the telephone icon.
- Click Option.



The dial options dialog lets you select the type of dialing and enter options for your area code; and local and long distance dialing.

- Make your selections and click OK.

Local Area Code: Type the area code for your area.

If the area code on a Name Card matches the code you enter here, C•A•T omits it when dialing the number. Enter *only* the area code. Do not precede it with '1'.

Dial for outside line: Enter any digits needed to get an outside line for a local call.

Long distance: Enter any digits needed to place a long distance call (usually at least a '1'). This should include the digits needed to get an outside line.

Speaker dialing

This option uses the Macintosh to generate audible tones recognized by analog phones. Typically, these phones are not used in larger companies with digital PBX systems.

To test whether your phone can use speaker autodial, select this option, hold the mouthpiece of your phone next to the Macintosh speaker, and have C•A•T dial a number.

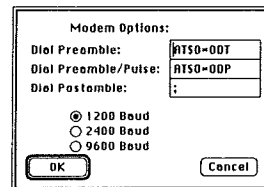
If the phone responds (i.e. if the dial tone stops), then you can use speaker dial. Purchase a product like HyperDialer to connect the speaker jack on the back of your Macintosh to your phone.

Modem dialing

- To use modem dial, check first to make sure that your modem is properly connected and working. If you need help, contact your modem vendor.
- On the dial options dialog, select either modem tone or pulse dialing.

Check your *phone* system (not your modem) to find out which setting is appropriate. Tone dialing is more likely.

For most modems, you are ready to dial. If you need to set more options, click Modem from the dial options dialog.



C•A•T uses no parity and two stop bits.

C•A•T will work without change with most Hayes-compatible modems. It may be necessary for you to preset certain switches on the modem.

Hayes modems accept the , (comma) character, which sends a two-second delay during dialing. They also accept P (pulse) and T (tone) for mixed-mode dialing. You may use these characters in the digits for accessing outside and long-distance lines.

Modem options

- If you have a *tone* phone system, select the box labeled 'Dial Preamble'. If you have a *pulse* phone system, select the box labeled 'Dial Preamble/Pulse'.
- Enter the modem commands needed in the preamble to prepare your modem for dialing. The default values are: ATTS0=ODT for tone or ATTS0=ODP for pulse. The 0's are zeros.

The modem commands for autodialing are in the manuals for your modem.

- In the box labeled 'Postamble', enter the modem commands needed to make your modem relinquish control of the phone system.

When dialing, C•A•T will send this preamble to the modem. Then it will send the digits to get an outside line; the phone number; and finally, the postamble.

- Select the baud rate for your modem.
- Click OK.

A vertical spiral binding runs down the center of the page, connecting the left and right pages.

Chapter 7

Managing Documents

This chapter shows you how to set the criteria for selecting documents. You'll learn to save the criteria as document views in the Views menu. Finally, you'll use document lists to review existing documents, print documents in batches, print reports, and delete documents.

You don't have to read this chapter in any particular order; each topic is independent of the others. When you want to know how to do something, go to the selection that explains that task. There you'll find a brief, general discussion and step-by-step instructions. Read the column for the task you want to perform and follow the steps, reading down the column.

Selecting Documents

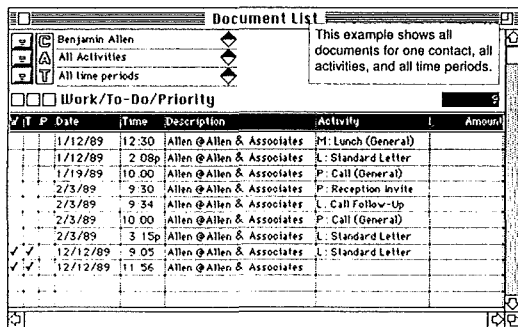
You can find, select, and open documents using the Document List window.

To select documents, set the criteria by clicking the **file drawers** and **checkboxes** at the top left.

For each criterion, you can select documents for specific accounts, contacts, classes, activities, and date ranges.

The criteria selected are shown to the right of each file drawer.

You can save the criteria in the custom Views menu and later choose document views from the Views menu.



To open the Document List

- Choose Document List from the Windows menu.

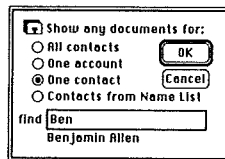
C•A•T opens the Document List. The documents shown depend on the criteria at the top left. The window may show many documents or no documents at all.

You can also open the Document List window by:

- Choosing Open ▾ Document from the File menu.
- Clicking the file drawer on the Document window.
- Clicking any visible part of the Document List window.
- Choosing a document view from the custom Views menu.

To set the contact criterion

- Click the first file drawer at the top left.



The dialog above lets you select documents for all contacts, one account, one contact, or all accounts shown on the Name List and their respective contacts.

- Make your selection.
- If you select one account or one contact, you can type in the search box to select a name.

For accounts, type a specific company name.

For contacts, you can type the first, last, or nick name.

- Click OK.

C•A•T shows the selected documents, if any.

To create an account history that shows all documents for an account, select one account, all activities, and all time periods from the three C•A•T file drawers.

To set the activity criterion

- Click the second file drawer at the top left.

C•A•T shows a dialog to let you select documents for:

- all activities
 - one activity class
 - one activity.
- Make your selection.
 - If you select one activity class or one activity, you can type in the search box to select a specific activity or class.
 - Click OK.

C•A•T shows the selected documents, if any.

To create a project analysis that shows all documents for one project, select all accounts, one activity, and all time periods from the three C•A•T file drawers.

To set the time criterion

- Click the third file drawer at the top left.

C•A•T shows a dialog to let you select documents for:

- all time periods
 - one date range
 - one date.
- Make your selection.
 - If you select one date range or one date, you can type a date range in the boxes.
 - Click OK.

C•A•T shows the selected documents, if any.

To create a calendar that shows all documents for a time period, select all accounts, all activities, and one time periods from the three C•A•T file drawers.

To set checkmark criteria

On the Document List window, there are three columns of checkmarks.

The columns are labeled with W, T, and P for Work, To-Do, and Priority; but you can use the columns for any purpose.

- You can check and uncheck to add or delete checkmarks.

To select documents by checkmarks:

- Check the boxes above each column.

When a box is checked, documents that have checkmarks in that column are selected and displayed.

When you uncheck the box, document selection is no longer restricted by that criterion.

If the window shows no documents and you have set criteria correctly, check the following:

- Is the scroll box at the top?
- Are any of the checkboxes checked?

When you create a new document or make changes to an existing document, the work checkmark is automatically added.

When you choose Save, all work checkmarks are deleted.

Selecting Contacts

To set the search criterion for contacts, click the first file drawer.

To select a specific contact or account, you can:

- type in the search box
- select from a list using next
- click or double-click names from the Name List and Name Card.

For each of the options to the right, make sure the Document List is open.

Click file drawers to set the search criteria and to select by typing.

Click here to open the Name List, Activity List, and Calendar; and to select by clicking.

Click the next buttons to select records from list-type windows.

#	D	P	Date	Time	Description	Activity	Amount
			1/12/89	12:30	Allen @ Allen & Associates	M: Lunch (General)	
			1/12/89	2:08p	Allen @ Allen & Associates	L: Standard Letter	
			1/19/89	10:00	Allen @ Allen & Associates	P: Call (General)	
			2/3/89	9:30	Allen @ Allen & Associates	P: Reception Invite	
			2/3/89	9:34	Allen @ Allen & Associates	L: Call Follow-Up	
			2/3/89	10:00	Allen @ Allen & Associates	P: Call (General)	
			2/3/89	3:15p	Allen @ Allen & Associates	L: Standard Letter	
			12/12/89	9:05	Allen @ Allen & Associates	L: Standard Letter	
			12/12/89	11:56	Allen @ Allen & Associates		

To select by typing

Click the first file drawer at the top left of the Document List window.

Select either one account or one contact.

Type in the search box to select a name.

For accounts, type a specific company name.

For contacts, you can type the first, last, or nick name.

Click OK.

C•A•T shows the selected documents, if any.

To select using the next button

If the account or contact you want is not shown, click the next button to the right of the first file drawer.

If you click the bottom half of the next button, C•A•T selects the next record from the Name List or Name Card.

If you click the top half, C•A•T selects the prior record.

Double-clicking the top half of the next button selects the first record. And double-clicking the bottom half selects the last.

When you click next, if 'All contacts' is selected, C•A•T simply beeps.

If a contact is selected, next selects the next name on the Name Card.

If an account is selected, next selects the next name on the Name List.

To select accounts by clicking

Click the name to the right of the first file drawer.

The Name List opens and the selected account is reversed.

Use the Name List to find and select the account you want.

Double-click the account.

C•A•T opens the Name Card and shows the selected account.

Click to activate the underlying Document List.

C•A•T sets the contact criterion to show one account, selects your specific account, and shows any related documents.

To select contacts by clicking

Click the name to the right of the first file drawer.

The Name List opens and the selected account is reversed.

Use the Name List to find and select the account you want.

Double-click the account.

C•A•T opens the Name Card and shows the selected account.

Double-click a contact from the list at the bottom.

C•A•T opens the Document List window, sets the contact criterion to show one contact, selects your specific contact, and shows any related documents.

To select a list of contacts

You can select a list of names and show all documents for the list.

Click the first file drawer at the top left.

Select 'Contacts from Name List' and click OK.

Click the name to the right of the first file drawer.

The Name List opens.

Display the accounts you want in the Name List.

For example, choose a view from the Views menu, or choose Make View from the Windows menu to create a view.

You can select specific contacts to include or exclude from your list.

Click to activate the underlying Document List.

C•A•T shows the selected documents, if any.

#	D	P	Account	City	St
			Alderson-Maxwell, Inc.	Anchorage	AK
			Allen & Associates	Milford	MA
			Brookside Hospital	Williamsport	PA
			Cureña Security Service	Tucson	AZ
			Edwards Aerospace Corp.	Medford	OR

Selecting Activities

To set the search criterion for activities, click the second file drawer.

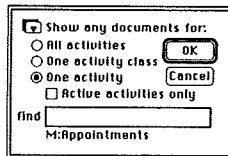
To select a specific activity or class, you can:

- type in the search box
- select from a list using next
- click names from the Activity List.

For each of the options to the right, make sure the Document List is open.

To select by typing

- Click the second file drawer at the top left of the Document List window.



- Select either one activity class or one activity.
- Type in the search box to select an activity or class.
- Click OK.

C•A•T shows the selected documents, if any.

To select using the next button

- If the activity or class you want is not shown, click the next button to the right of the second file drawer.

If you click the bottom half of the next button, C•A•T selects the next record from the Activity List.

If you click the top half, C•A•T selects the prior record.

Double-clicking the top half of the next button selects the first record. And double-clicking the bottom half selects the last.

When you click next, if 'All activities' is selected, C•A•T simply beeps.

If a class is selected, next selects the next class from the class pop-up menu.

If an activity is selected, next selects the next name on the Activity List.

To select activity class by clicking

- Click the name to the right of the second file drawer.

The Activity List opens.

- Choose the activity class from the pop-up menu.

- Click to activate the underlying Document List.

C•A•T sets the activity criterion to show one activity class, selects your activity class, and shows any related documents.

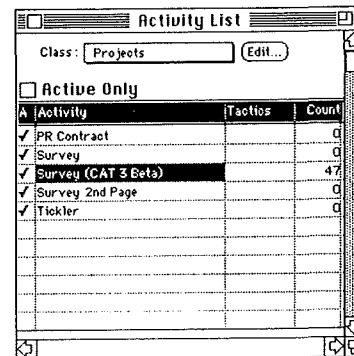
To select activities by clicking

- Click the name to the right of the second file drawer.

The Activity List opens. Use the pop-up menu to find the activity you want.

- Double-click the activity.

C•A•T opens the Document List window, sets the activity criterion to show one activity, selects your specific activity, and shows any related documents.



To select a list of activities

You can select a sublist of activities within an activity class and show all documents for the list.

- Click the second file drawer at the top left.

- Select One activity class, check Active only, and click OK.

- Click the name to the right of the second file drawer.

The Activity List opens.

- Checkmark the activities you want and uncheck the ones you don't want.

- Check Active Only to show just the selected activities.

- Click to activate the underlying Document List.

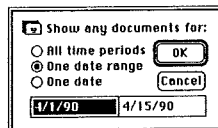
C•A•T shows the selected documents, if any.

To set the search criterion for time, click the third file drawer.

- type in the search box
- select using the next button
- click or double-click date ranges from the **Calendar**.

To select by typing

- Click the third file drawer at the top left of the Document List window.



- Select either one date range class or one date.
- Type in the boxes to select a date range.
- Click OK.

C•A•T shows the selected documents, if any.

- If the date range you want is not shown, click the next button to the right of the third file drawer.

If you click the bottom half of the next button, C•A•T selects the next date or range of dates.

For example, if you selected a seven day range for a specific week, clicking next advances the range to show the next week.

If you click the top half, C•A•T selects the prior range of dates.

- Click the date range to the right of the third file drawer.

The Calendar opens.

- Select the month and year on the right.
- Select the date.
- Click again on your selected date.

C•A•T opens the Document List window, sets the time criterion to show one date, selects your specific date, and shows any related documents.

- Click the date range to the right of the third file drawer.

The Calendar opens.

- Select the month and year on the right.
- Click the box to the left of the week you want.

C•A•T opens the Document List window, sets the time criterion to show one date range, selects your specific week, and shows any related documents.

- Click the date range to the right of the third file drawer.

The Calendar opens.

- Select the month and year on the right.
- Click again on your selected month.

C•A•T opens the Document window, sets the time criterion to show one date range, selects your specific month, and shows any related documents.



Click in these boxes to select week ranges.

Click to select
day, month,
and year.

Click again to select one day or one month ranges.

Custom Menu of Document Views

The Views menu is your custom menu of name lists and document lists.

Document views start at the bottom of the Views menu.

Choose Set Menu to add, replace, or remove saved views from the menu.

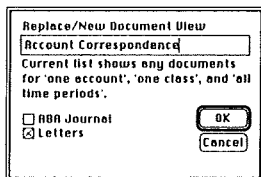
You can choose a document view from the Views menu to set the criteria for the Document List window.

Note that when you save a document list as a view, you save the selection criteria—not the specific documents.

For example, if you create the view to the right, the view when chosen uses the current selected account—not the account shown. Thus the list of documents could be different if the selected account is not the same.

To add a menu item

- Set the Document List to show the documents you want.
- Choose Set Menu from the Views menu.
- On the custom menu dialog, click New.



The checkboxes let you select specific accounts, contacts, classes, activities, and date ranges.

If you don't check a box, the view when chosen uses the last selected record. In the example above, the specific 'letter' activity class is selected, but the specific account name is not.

- Name the view, check your options, and click OK.

A new view is added to the menu.

To change a menu item

- Choose the view to change from the Views menu.
- Change the Document List to show the documents you want.
- Choose Set Menu from the Views menu.
- On the custom menu dialog, choose the view from the pop-up menu. Click Replace.
- On the document view dialog, check your options and click OK.

The new menu item replaces the prior entry in your custom menu.

To remove a menu item

- Choose Set Menu from the Views menu.

C•A•T shows a dialog for managing custom menus.

- Choose the menu item to remove from the pop-up menu.

- Click Remove.

C•A•T shows a dialog to confirm the action.

- Click OK.

The menu item is removed from your custom menu.

To choose a view

- Choose a document view from the Views menu.

When you choose a view C•A•T does the following:

- Opens the Document List.
- Sets the file drawer criteria and checkboxes as instructed.
- Selects specific contacts, accounts, activities, classes, and date ranges if those options were checked.
- If the 'Set date range from the Macintosh' option is checked, C•A•T adjusts the date range using the current date from the Macintosh.

This option is available on the document view dialog if your time criterion is for a date range. It auto advances the date range to include the current date for time dependent views like to-do lists and sales reports.

- Shows all documents using the new criteria.

Using Document Lists

Use a document list to:

- find and open documents
- review a list of documents
- print documents
- delete documents
- prepare reports that retrieve data from many documents.

To open a document

- Choose Open ▾ Document from the File menu.

The Document List opens.

- Use the file drawers and checkboxes to show the documents you want, or choose a document view from the Views menu.

- Double-click the document you want.

The Document window opens and shows the selected document.

- You can make changes to the document and click Enter to file the changes.

To review a list of documents

- Select a list of documents.

- Double-click the first document.

The Document window opens and shows the selected document.

- Click the next button at the top left.

If you click the bottom half, C•A•T selects and displays the next document from the list shown in the Document List.

If you click the upper half, C•A•T selects the prior document.

On the extended keyboard, you can press the PageUp and PageDown keys to get the same result.

On normal keyboards, you can press the ⌘-UpArrow and ⌘-DownArrow keys.

Double-clicking the top half of the next button selects the first document on the Document List. And double-clicking the bottom half selects the last.

To delete documents

- Select a list of documents.

- Choose Delete Records from the Edit ▾ Records submenu.

C•A•T confirms by asking if you want to delete all the documents.

- Click OK.

If you deleted by mistake, use the Quit command without saving the changes to disk.

If you have already used the Save command, then you must resort to backup copies of your file to recover the deleted information.

To delete a single document:

- Find and open the document you wish to delete.
- Click the Delete button on the Document window.

To print documents

- Select the documents using the Document List window.

For example, choose a document view from the Views menu; or choose the Document List from the Windows menu and use the file drawers and checkboxes to select your documents.

- Choose Print from the File menu.

- Check All Current Documents.

- Click Print.

To prepare reports

You can create draw templates that retrieve data from many documents. From each of the selected documents, C•A•T extracts the data to produce reports.

For example, you can prepare a list of sales orders and use C•A•T to retrieve the sales totals for the month.

Or prepare a summary of your weekly activities.

To produce these reports, select the list of documents.

For details on referencing many documents, see the Form Processing Manual.

Navigating Windows

From the Document List, you can open:

- the Name Card
- the Name List
- the Activity List
- the Template window
- the Calendar
- the Document window.

To click

- Click on the three lines to the right of the file drawers to open the Name List, Activity List, and Calendar.

From these list windows, you can select the items you want.

To double-click

- Double-click on the three lines to the right of the file drawers to open the Name Card, Template window, and Calendar.

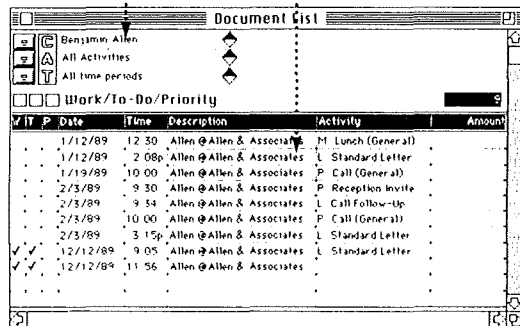
From these edit windows, you can make changes to name cards and templates.

You can also double-click a document to open the document and make changes.

Double-click here to open the Name Card, Template window, and Calendar

Click to open the Name List, Activity List, and Calendar

Double-click to open any document



Chapter 8

Printing

This chapter explains the printing features of C•A•T.

You don't have to read this chapter in any particular order; each topic is independent of the others. When you want to know how to do something, go to the selection that explains that task. There you'll find a brief, general discussion and step-by-step instructions. Read the column for the task you want to perform and follow the steps, reading down the column.

Printing

You can print a document, a batch of documents, mailing labels, and envelopes; merge print using text and draw templates; and list print to produce reports with rows and columns.

Use the Chooser desk accessory to select a printer. Use Page Setup to select page orientation and paper size.

Documents can be printed to screen.

To select a printer

Use the Chooser desk accessory to select the printer that you want. (You can also use Chooser to select other devices that may be connected to your computer—like file servers, fax boards, modems, etc.)

If you tend to use the same printer all the time, you can usually skip this step.

To change your printer selection:

- Choose Chooser from the Apple menu.
- The Chooser shows icons for the devices available to you.
- Select the icon for the printer you want. The upper right shows more options.
- For the Imagewriter, select either the Printer or Modem port. For the Laserwriter, select the printer by name. For other devices, select your options.
- Click the close box.
- Choose Page Setup from the File menu and confirm the settings.

To print documents

- Choose Page Setup from the File menu to set printing options such as page orientation and paper size.

If you tend to use the same setup all the time, you can usually skip this step.

- Choose Print from the File menu.

Depending on the items you want to print, you'll be presented with one or more dialog boxes. Each dialog lets you select options for the task selected.

If you cannot print or cannot select a printer, check the following:

- Is the cable connecting your Macintosh to the printer loose?
- Is the printer and select light turned on?

About Imagewriters

If you use an **Imagewriter** or compatible Quickdraw printer, note the following:

- Make sure that the printer is ready, the select light is on, and the paper is at the top of a form.

If you need to force the true **top of form**, align your paper. Then turn the printer off and on again.

- Make sure you have enough space on your disk for the **spool file**. You can approximate the space needed by multiplying the number of documents by 2K.

If you're printing hundreds of documents, C•A•T breaks the job into batches of 100 at a time. In the extreme case, you'll need 200K of disk space.

- C•A•T does support **draft** printing, but the document will not be the same as the

C•A•T has been tested with compatible printers from GCC, Hewlett Packard, and Epson. For each printer, you need to acquire print drivers available from those companies and their resellers.

About Laserwriters

If you use a **Laserwriter** or compatible Postscript printer, note the following:

- Make sure that the printer is connected to your Macintosh, the printer is selected, and that the right paper is in the paper tray.

- You can reduce printing time by choosing **fonts** that are preloaded on Laserwriters. These include Times, Courier, and Helvetica—at minimum.

For each batch of documents, C•A•T downloads any needed font only once—to accelerate printing.

- C•A•T is compatible with print **spoolers** that print to a file and then send the file to the printer.

If you're printing hundreds of documents, you may want to disable spoolers since each document would require approximately 2K of disk space per page.

To preview printing

The preview button on the print dialog allows you to print the documents to screen. Each document is sized so that the entire document fits on your screen.

The preview has options to **zoom**, **unzoom**, proceed with the **next** document, or **cancel** the preview. To use the preview:

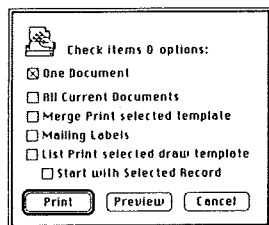
- Click on the document to zoom and unzoom.
- If you click in the gray area outside the document (or press any key on the keyboard), C•A•T proceeds to the next page.
- Click outside the dialog box (e.g., in the menu bar) or press **⌘.** (i.e. the period key) to cancel the preview.

As you move the mouse over the preview dialog, the pointer changes to a magnifying glass for zoom, a slashed magnifying glass for unzoom, a down arrow for next, or the pointer for cancel.

Printing Documents

To print documents, you generally select the document, list of documents, list of names, or templates. Then choose Print from the File menu.

Depending on the items you want to print, you'll be presented with one or more dialog boxes. Each dialog lets you select options for the task selected.



To print one document

- Select the document to print. You can:
 - choose Document List from the Windows menu and select one document
 - print the current document in the Document window.
- Choose Print from the File menu.
- Check One Document.
- Click Print.
- On the job dialog, click OK to start printing.

If you want to insert letterhead paper before printing, select Manual Feed on the job dialog.

To print a list of documents

- Select the documents using the Document List window.

For example, choose a document view from the Views menu; or choose the Document List from the Windows menu and use the file drawers and checkboxes to select your documents.
- Choose Print from the File menu.
- Check All Current Documents.
- Click Print.
- On the job dialog, click OK to start printing.

If you want to print on letterhead paper, change the paper tray before starting the job or select Manual Feed on the job dialog.

To cancel printing

- Click Cancel or press ⌘- (i.e., the period key).

If you cancel while printing a list of documents, the next document to print is selected on the Document List window.

To resume printing

While printing a list of documents, if the job is interrupted or you cancelled printing, you can resume printing without starting from the first document. To resume printing:

- Select the document to start from on the Document List.
- Choose Print from the File menu, check your options, check 'Start with Selected Record' at the bottom, and click Print.

C•A•T resumes printing starting with the selected document.

Merge or List Printing

You can merge print documents using the selected template for each name in a list of names.

You can also choose the list print option for reports. List print is similar to merge print except C•A•T prints as many records as will fit on each page.

See the Forms Processing Manual for additional information on list print.

To merge print

- Display the accounts you want in the Name List.

For example, choose a view from the Views menu, or choose Make View from the Windows menu to create a view.

Be sure to select specific contacts—not just accounts—to include or exclude from your list.

- Choose Activity List from the Windows menu and select the template you want to use.

The template can be either the text or draw type.

- Choose Print from the File menu, check Merge Print, and click Print.

- On the job dialog, click OK to start printing.

If you want to print on letterhead paper, change the paper tray before starting the job.

To list print

- Display the accounts you want in the Name List.

For example, choose a view from the Views menu, or choose Make View from the Windows menu to create a view.

If you're printing a list by contact, be sure to select specific contacts to include or exclude from your list.

- Choose Activity List from the Windows menu and select the template you want to use.

The template must be a draw template.

- Choose Print from the File menu, check List Print, and click Print.

- On the job dialog, click OK.

The list print dialog allows you to select the sorting order, and to print either a record for each account or contact.

- Make your selections and click OK.

C•A•T prints the report.

To cancel printing

- Click Cancel or press ⌘- (i.e., the period key).

When you cancel printing, the next name to print is selected on the Name List window.

To resume printing

If the job is interrupted or you cancelled printing, you can resume printing without starting from the top. To resume printing:

- Select the account to start from on the Name List.

- Choose Print from the File menu, check your options, check 'Start with Selected Record' at the bottom, and click Print.

C•A•T resumes printing starting with the selected name.

Mailing Labels and Envelopes

You can set up and save multiple layouts for mailing labels and envelopes.

To print labels, choose Print from the File menu, check Mailing Labels, and click Print.

You can print labels for a list of names or for a list of documents.

Width is measured from the left edge of a label to the left edge of the next label—i.e., the width of a label plus any space between labels.

Height is measured from the top edge of a label to the top edge of the label below—i.e., the height of a label plus any space between labels.

Left margin is measured from the left edge of the sheet to the left of the label.

Top margin is measured from the top edge of the sheet to the top of the label.

Labels Across is the number across for each label sheet.

For the **Laserwriter**, purchase sheets of labels that are custom designed for Laserwriters.

For the **Imagewriter**, purchase fan-fold sheets of labels. Each sheet can have one, three, or more columns of labels. Be sure to purchase labels where the height of each sheet matches a standard size that the Macintosh accepts, such as 11" or 14" paper.

For either type printer, click Page Setup to select the sheet size you are using.

To create a label setup

- Choose Label Setup from the File menu.
- Click New.

A dialog of label options is shown. You can set margins; select items to print; set the font, size, style; select the sort sequence; and set the page

setup.

- Select your options and click OK.

On the Page Setup options, make sure you select No Margins for the Imagewriter and the Larger Print Area for the Laserwriter.

Labels need a print area that includes as much of the full dimensions of the paper as allowed by each printer.

The Page Setup options are saved with each label setup.

To change label layouts

- Choose Label Setup from the File menu.
- Choose the setup from the pop-up menu.
- Click Replace to make changes or Remove to delete the setup.

Click the item name to set the font, size, and style for items one at a time.

Click Set Fonts to set the font, size, and style for all selected items.

If you want to print name card data that is not listed above, create a draw template and use List Print to produce multiple-column reports.

Margins for envelopes

To print on envelopes, create a label setup with the following selections:

- Click Page Setup and select sideways paper orientation.
- For normal envelopes, enter a width of 11.0 and height of 8.5.
- Left margin measures the distance between the left edge of the envelope and the left edge of the address. For a standard (#10) envelope, enter 4.0.
- Top margin measures the distance between the top of the envelope and the top of the address. For a standard (#10) envelope, enter 2.0.
- For labels across, enter 1.
- Select other options as appropriate.

Mailing labels can print as many lines of street addresses as will fit on a label.

If the name is a personal contact with no company affiliation (i.e. the last name is used for the account name), the company item is not printed.

Normally, C-A-T prints a label for each selected contact. If an account has no contacts, C-A-T still prints a label using just the account data.

To print labels for documents

- Select the documents using the Document List window.

For example, choose a document view from the Views menu; or choose the Document List from the Windows menu and use the file drawers and checkboxes to select your documents.

- Choose Print from the File menu, check Mailing Labels, and click Print. You can check 'Start with Selected Record', to print starting with the selected record.
- On the job dialog, click OK.

- Choose a layout from the pop-up menu and click OK.

When printing labels for documents, the labels are not sorted. They are printed in the same order as the documents.

To print labels for a list of names

- Display the accounts you want in the Name List.

For example, choose a view from the Views menu; or choose Make View from the Windows menu to create a view.

Be sure to select specific contacts—not just accounts—to include or exclude from your list.

- Choose Print from the File menu, check Mailing Labels, and click Print. You can check 'Start with Selected Record', to print starting with the selected record.
- On the job dialog, click OK.

If you want to manually insert sheets of label paper or envelopes, select Manual Feed on the job dialog.

- Choose a layout from the pop-up menu, select Use Name List, and click OK.

Trouble Shooting

If you attempt to print and nothing happens, check the following:

- Make sure the printer is on and selected using Chooser.
- Check the cable between the Macintosh and the printer to make sure it is fastened securely.
- Try preview to screen. If C•A•T prints correctly to screen, then there may be a problem with the specific driver you are using.
- Exit C•A•T. Then test the printer from the Finder by choosing Print Catalog from the File menu. If nothing prints, you have a problem with your system, the cabling, the drivers, or printer. Consult your dealer for help.

Chapter 9

Managing Files

This chapter describes the commands for working with files. You can create new files, open existing files, set passwords, share data among users, and import text files.

You don't have to read this chapter in any particular order; each topic is independent of the others. When you want to know how to do something, go to the selection that explains that task. There you'll find a brief, general discussion and step-by-step instructions. Read the column for the task you want to perform and follow the steps, reading down the column.

Managing Files

C•A•T saves all names, templates, and documents in one file on the Macintosh desktop.

You can have multiple files each with its own set of names, templates, and documents.

You can create new files and open any file to make changes.

Use the Macintosh Finder to move, copy, delete, and rename files.

C•A•T files are similar to document files created by simple applications—except C•A•T can save thousands of documents in the same file. Thus C•A•T files are bigger than typical single document files.

However, if you were to save the same number of documents as individual document files, the disk space required is 10 to 100 times greater.

To create a new file

- Choose New ♦ Database from the File menu.

If you have made changes to the current file, C•A•T asks if the changes should be saved first. Click Yes to save, No to discard changes, or Cancel.

The new database command sets up C•A•T to let you enter names, templates, and documents into a new file.

If you double-click the C•A•T program icon to start up, C•A•T presents the open dialog to let you select an existing file. If you want to start a new file, click New.

To open a file

- Choose Open ♦ Database from the File menu.

If you have made changes to the current file, C•A•T asks if the changes should be saved first. Click Yes to save, No to discard changes, or Cancel.

Then C•A•T presents the open dialog to let you select an existing file.

- Select the file you want and click Open.

The selected file is opened.

To save a file

- Choose Save, Save As, or Quit from the File menu.

If you choose Save, C•A•T saves your changes and allows you to make more changes.

If you choose Save As, C•A•T saves your changes to a copy of the file using a different file name for the new file. If you have a large file, be sure that your disk has enough space available for the new file.

If you choose Quit, C•A•T asks if changes should be saved. After saving changes, C•A•T exits to the Finder.

When you save, C•A•T moves your changes from the CHG file and updates the file on disk. Save makes the changes permanent.

See 'Auto-save Changes' later in this chapter.

To exit C•A•T

- Choose Quit from the File menu.

C•A•T asks if changes should be saved. After saving changes, C•A•T exits to the Finder.

To back up and maintain files

- Exit to the Finder.

- Insert a disk in the drive.

- Drag the file to the icon of the new disk.

If your file is larger than the capacity of one disk, use the Backup utility from the Macintosh Utilities disk or any commercial backup program to copy the file onto multiple disks.

To use backup files:

- Insert the backup disk in the drive.

- Double-click to open the disk and drag the file to your hard disk.

If your backup is on multiple disks, use the same backup utility to copy the file back to your hard disk.

To delete a file:

- Drag the file to the trash can icon.

When you delete a file, you are deleting all the names, templates, and documents in the file.

Passwords

You can set two-levels of passwords:

- When you enter the system password, you have full access to all commands.
- When you enter the user password, you cannot create or make changes to templates.

Set passwords to protect your file from unauthorized use.

You can set a two level password so that you can restrict changes to templates by other users.

To set passwords

- Choose Options ♦ Password from the Edit menu.

- Type a system password and click OK.

- Choose Options ♦ Company Name from the Edit menu.

A dialog appears. It has boxes for your company name and address; one user name; and a password.

- Type a user password and click OK.

When setting passwords, please note the following:

- Passwords can have up to eight characters.
- C•A•T distinguishes between upper from lower case.
- Write down the passwords in case you forget them. Store them where you can find them.

Using passwords

- Choose Options ♦ Lock from the Edit menu.

A large dialog covers most of your screen. The box in the middle lets you enter a password.

- Type either password and click OK.

If you type the user password, then all commands for creating and changing templates are disabled.

If you type the system password, then all commands are enabled.

If you type neither, the dialog would prevent you from getting access to your data. Don't forget your passwords.

If have not set either the system or user password (i.e., the password box contains nothing), then the Lock command accepts a blank response.

Password-protected files

When you try to open a file that has been protected with passwords, C•A•T shows the lock dialog.

You can enter either the system or user password.

If you fail to enter the correct password after three tries, C•A•T exits to the Finder.

If you set a system password and do not set a user password, then C•A•T starts up the file without first showing the lock dialog. In this case, C•A•T assumes you want the user level and commands for creating and changing templates are disabled.

To change passwords

If you entered the system password on the lock dialog, then you can change either the system or user password.

If you entered the user password, you can change the user password and not the system password. Use the company name dialog to change the user password.

To delete passwords, delete the text in both the system and user password boxes.

Auto Save Changes

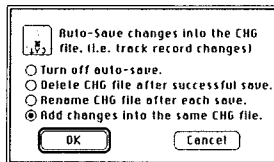
You can protect yourself from accidental data loss by selecting the auto save feature.

If you select auto save, C•A•T saves your changes to the CHG file whenever there is no action on your keyboard or mouse for five minutes.

If your system fails for whatever reason, you can merge to recover any changes that were saved to the CHG file.

To set auto save

- Choose Output To Disk ▾
Set Auto-save Changes from the File menu.



- Select the Delete option.
- Click OK.

Any new entries or changes you make will be saved periodically to the CHG file.

To recover

- Start up C•A•T and open your file.

- Choose Input From Disk ▾
Merge Changes from the File menu.

C•A•T shows the open dialog to let you select a CHG file.

- Open the CHG file with the same file name.

A dialog states: 'This is your current .CHG file. Proceed?'

- Click OK.

C•A•T merges all changes and additions from the CHG file.

Sharing Files

C•A•T offers three ways to share data:

- fast import and export
- merging changes from remote users
- and publishing and subscribing to names and templates.

Unlike file-server based databases, the C•A•T modes for sharing are not restricted by the complexity and speed limitations of network solutions.

Each user has full access to all commands and the performance of a dedicated computer.

Remote user

If you want to use the C•A•T database while on the road and office users need to use it at the same time—use the Auto-save Changes and Merge feature.

- As the remote user, take a copy of the database.
- Choose Output To Disk ▾
Set Auto-save Changes from the File menu and turn on Auto-save as shown below.
- On the road, make changes or add new records in the normal way. C•A•T creates a small CHG file containing your changes.
- When you return to the office, give the office user the CHG file.

Office user

The office user loads the office copy of the database.

- Chooses Input From Disk ▾
Merge Changes from the File menu.
- Opens the CHG file created by the remote user.

C•A•T merges all changes from the remote user into the office copy.

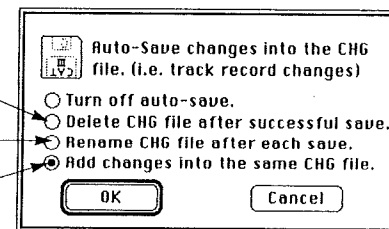
New records are added.

Each change is updated only if the update is more recent than the office copy.

Select this option to protect against loss of data.

Use this option on long trips, with multiple updates (by modem or disk) during the trip.

Select this option on short trips with one update at the end of the trip.



Publish & Subscribe

The Publish & Subscribe model lets you publish a file of names or templates.

Other users can subscribe to the data.

The subscriber may use the names and templates to create their own merged documents.

When you have updates to the names or templates, you again publish the names or templates.

For existing subscribers, updates replace and do not create new records in the subscriber's database.

This allows one user to maintain a list while many subscribers use the up-to-date data.

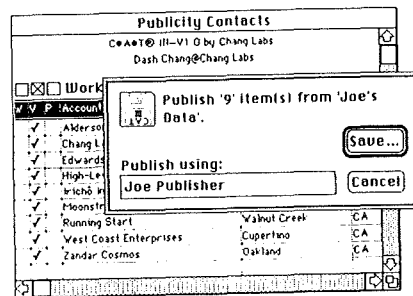
Publish & Subscribe will become more automated when Apple's System 7.0 is available.

To publish the data

- To publish data, select a list of names or templates using the Name List or the Activity List.

- Choose Output To Disk ▾
Publish Data from the File menu.

A dialog requests the publisher's name. The name identifies the source of the data. Once set, the name should not change.



- Enter a publisher name and click Save.

C•A•T asks for the name of the data file.

- Name the data file by its contents.

It's a good idea to use file names like 'Dec press upd'.

- Click Save.

You can pass the file to your subscribers by mail or by downloading to a file server.

Repeat these steps to issue updates.

Generally, one database should have only one publisher.

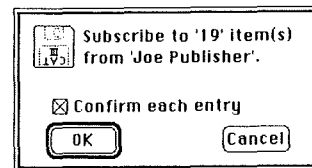
But a subscriber can receive data from many different publishers

To subscribe to data

- Choose Input From Disk ▾
Subscribe To Data from the File menu.

- You will be asked which file to open. Double-click the file you want.

C•A•T shows a dialog of options.

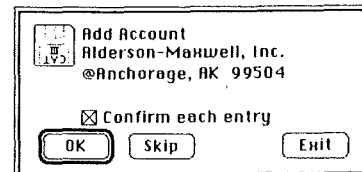


- Select your options and click OK.

To subscribe to updates

Repeat the same steps when updates from the publisher are received.

Changed records are replaced and new records are added to your data file.



As each account is entered, it is displayed. You can accept or choose to skip it.

Importing & Exporting

The Import Text command lets you load text files created by other applications.

If you want to organize multiple contacts from the same company into a single Name Card, sort the text file by the account name.

Import Text organizes consecutive records with the same address into one Name Card.

To prepare text files

To create a text file from other applications:

- From FileMaker, choose Output To and click Tab.
- From File, choose Save Records As and click Text.
- From Works or Excel, choose Save as and click the Text option.
- From Word or MacWrite, use tabs to separate name, address, city, state, etc. Choose Save as and click the Text and the Paragraph options.

To import names

- Start C•A•T and choose Input From Disk ▸ Import Text from the File menu.

The open dialog allows you to select the text file.

- Double-click on the file you want to import.

The import dialog below lets you set import options.

C•A•T checks for duplicates, translates all caps into upper and lower case, and lets you accept or reject records one by one. Duplicate check on large files can be time consuming.

One by one, match each entry in the left pop-up menu with the appropriate C•A•T field. For example, Arnold Lanham is the contact name.

To export C•A•T data

You can send C•A•T data—with contacts, templates, and documents—to other C•A•T users.

The Export Data command is the fastest way to move data and exports font, size, style, format, and picture data as well as any text.

- First, select the accounts you want to export on the Name List. You can also select templates to export using the Activity List.
- Choose Output To Disk ▸ Export Data.

C•A•T asks you to name the file and then does the export.

You can choose A.Address, A.Keyword, A.Note, C.Keyword, C.Note for as many fields of the text file as you want. Other C•A•T fields should be selected only for one field.

A CSZ parses city, state, and zip data that has been entered as one field in the text file. C Name does the same for the contact's first and last name.

To import C•A•T data

- Choose Input From Disk ▸ Import Data.

The open dialog allows you to select which file to open.

- Double-click on your choice.

C•A•T gives you the option to confirm each entry.

- Make your choice and click OK.

Each imported record is added to your database, without checking for duplicates.

Here are three formats supported by C•A•T. The two above are Word files. The upper one separates fields using tabs, the lower one uses quotes and commas. Below is a spreadsheet. Each field is one column. Choose Save As and select the Text option for import to C•A•T.

	A	B	C	D	E	F
1	ARNOLD LANHAM	LANHAM BROTHERS	43109 GOLF LA	Antioch	IL	60002
2	VERONICA HARFF	PRESTIGE PRODUCTS	679 BLOOMINGTON	Arlington Hts	IL	60004



Chapter 10

Command Reference

This chapter describes menu commands—giving a capsule description and referring you to the place in the manuals where the command is described using step-by-step instructions.

The commands are listed in the order of their appearance on the menu bar, starting on the left.

In this chapter, FP refers to the Form Processing Manual and WP refers to the Word Processing Manual.

File Menu

MENU COMMAND	KEYBOARD EQUIVALENT	DESCRIPTION	SEE PAGE
New ▾			
Name Card	⌘-1	Create a new name card	4-8
Document	⌘-2	Create a new text document or merged form	6-4
Draw Document	⌘-3	Create a new draw document	6-4, FP
Text Template	⌘-4	Create a new text template.....	5-6, WP
Draw Template	⌘-5	Create a new draw template.....	5-6, FP
Report Layout	⌘-6	Create a new layout with multiple rows and columns.....	5-6, FP
Database		Create a new file	9-2
Open ▾			
Name Card		Find and open a name card	4-2
Document		Find and select documents	7-2
Draw Document		Find and select documents	7-2
Text Template		Find and open a template.....	5-4
Draw Template		Find and open a template.....	5-4
Report Layout		Find and open a template.....	5-4
Database		Open another file.....	9-2
Save	⌘-S	Save file to disk.	9-3
Save As...		Save a copy of the file using a new file name	9-3

MENU COMMAND	KEYBOARD EQUIVALENT	DESCRIPTION	SEE PAGE
Input From Disk ▾			
Import Text...		Import text file of names and addresses.....	9-10
Import Data...		Import a disk file of C•A•T data.....	9-11
Merge Changes...		Merge a CHG file to recover from problems	9-6
Subscribe to Data...		Merge a file published by another user	9-9
Output To Disk ▾			
Export Text...		Not available.	
Export Data...		Export selected C•A•T data to a disk file	9-11
Set Auto-save Changes...		Set options for auto save change feature	9-7
Publish Data...		Publish a file of C•A•T data for use by subscribers	9-8
Print	⌘-P	Print documents, reports, labels, and envelopes.....	8-2
Page Setup...		Set paper sizes and orientation	8-2
Label Setup...		Set up layouts for printing labels and envelopes.	8-8
Quit	⌘-Q	Quit to the Finder	9-3

Edit Menu

MENU COMMAND	KEYBOARD EQUIVALENT	DESCRIPTION	SEE PAGE
Undo	⌘-Z	Undo the most recent text or draw action.....	WP, FP
Cut	⌘-X	Remove selected text and copy it to the clipboard.....	4-7
Copy	⌘-C	Copy selected text or picture to the clipboard.....	4-7
Paste	⌘-V	Paste contents of clipboard at the insertion point.....	4-7
Clear		Remove selected text.....	4-6
Select All	⌘-A	Select all text or objects.....	5-6
Duplicate	⌘-D	Duplicate selected objects.....	FP
Records ▾			
Copy Records...		Not available	
Delete Records...		Delete all records in a name or document list.....	4-13, 7-13
Fix Links...		Use when so instructed by Chang Labs support staff.	
Pack Records...		Use when so instructed by Chang Labs support staff.	
Find ▾			
Find Text...	⌘-F	Enter text to be found; then find it.....	WP
Find Again	⌘-G	Find next occurrence of text.....	WP
Change...	⌘-H	Enter text to be replaced, and its replacement.....	WP
Change Again	⌘-J	Replace next occurrence of text.....	WP

MENU COMMAND	KEYBOARD EQUIVALENT	DESCRIPTION	SEE PAGE
Options ▾			
Company Name...		Enter personal data and user password.....	9-4
Password...		Enter system password.....	9-4
Lock		Lock file and request password for further use.....	9-4
Set Colors...		Set the color for your desktop and two custom drawing colors.	
Preferences...		Set preferences.	
Show warning for entry errors.			
Auto-create activities.			
		Lets you create simple activities from the Document window.....	6-15
Enable search using nicknames.			
Early bird. Assume 7 and 8 mean AM - not PM.			
		Refers to the time box in the Document window.....	6-6
Auto-enter record changes.			
		If you change a document, then select another document without clicking Enter, C•A•T files the changes automatically.	
On zoom, close the last window.			

Windows and Other Menus

MENU COMMAND	KEYBOARD EQUIVALENT	DESCRIPTION	SEE PAGE
Windows menu			
Desktop ▾		Custom menu of window arrangements on screen.....	3-8
Set Menu...		Add, replace, and delete items from the menu	3-8
Name List	⌘-7	Open the Name List window	4-12
Document List	⌘-8	Open the Document List window	7-2
Calendar	⌘-9	Open the Calendar	7-8
Activity List	⌘-0	Open the Activity List window	5-4
Status	⌘-=	Show a dialog of record status information.	
Make View...	⌘-M	Create a saved name list.....	4-14
Merge Views...		Merge two views.....	4-18
Clone Documents...		Create copies of a document for a list of names	6-5
Views menu			
Set Menu...		Custom menu of name and document lists.....	4-12, 7-2
Activities menu			
Set Menu...		Add, replace, and delete items from the menu	5-8, 6-5
Other keyboard equivalents			
Enter button	Enter		
New button	⌘-N		
New contact button	⌘-K		
Close box	⌘-W		

Draw Menu Bar

These menus are only available when a drawing task is selected

MENU COMMAND	KEYBOARD EQUIVALENT	DESCRIPTION	SEE PAGE
Format menu			
Text Align		Choose left, right, or center text alignment from the submenu.	FP
Fill Pattern		Select a fill pattern from a palette of 40 patterns.	
Line Size		Choose a line size from the submenu.	
Line Pattern		Select a line pattern from a palette of 40 patterns.	
Text Inset		Enter the inset in pixels for text boxes.	
Zoom		Choose the zoom factor from the submenu.	
Hide Rulers		Hide the draw rulers.	
Grid/Rulers		Choose a grid resolution and type of ruler from the submenu.	
Snap to Grid		Set or unset the snap-to-grid feature.	
Group	⌘-G	Group selected objects into one image.	
Ungroup		Ungroup the selected group object.	
Move to Front		Move selected objects to the front.	
Move Forward		Move selected objects forward.	
Move to Back		Move selected objects to the back.	
Move Backward		Move selected objects backward.	
Font menu			
Style menu		Menu of available fonts on your system	FP
Library menu			
Set Menu...		Menu of styles and font point sizes.....	FP
		Custom menu of frequently used objects.....	FP
		Add, replace, and delete items from the menu.....	FP

Text Menu Bar

These menus are only available when a text editing task is selected

MENU COMMAND	KEYBOARD EQUIVALENT	DESCRIPTION	SEE PAGE
Format menu			WP
Hide Ruler		Hide the ruler on the Template and Document window.	
Left Align		Align text to the left.	
Right Align		Align text to the right.	
Center		Center text between ruler margins.	
Justify		Align text on both the left and right margins.	
Single Space		Single space between lines in a paragraph.	
1-1/2 Space		1-1/2 space between lines in a paragraph.	
Double Space		Double space between lines in a paragraph.	
Other Spacing...		Custom spacing between lines in a paragraph.	
Page Break		Start a new page following this paragraph.	
Show ¶		Show each paragraph-end marker on screen.	
Margins...		Set the top, left, and bottom margins for your paper.	
Font menu		Menu of available fonts on your system	WP
Style menu		Menu of styles and font point sizes	WP
Glossary menu		Custom menu of frequently used phrases and paragraphs	WP
Set Menu...		Add, replace, and delete items from the menu	WP

Glossary

account: A record entered in C•A•T to store the names and addresses of companies or individuals.

active window: The frontmost window on the desktop.

activities: A custom menu of frequently used templates.

activity: A name used to categorize documents, often associated with templates.

activity class: A general heading for grouping different types of activities and templates.

auto save changes: To save changes to the CHG file.

autodial: Automated dialing of the telephone via a modem or equivalent device.

back up: To make an extra copy of your files on disk in case the original is lost or damaged.

billable rate: Rate set up in advance in the Tactics window to let you compute billable amount for time spent on a certain task.

button: Part of a dialog box

or window that is clicked to perform certain actions.

click: To position the pointer on something, press and quickly release the mouse button.

cloning: A feature in C•A•T used to create documents for more than one contact at a time.

close: To hide a window from your desktop by clicking the close box.

close box: The square on the left side of the title bar of a window. Click in it to close the window.

command: An action for C•A•T or the Macintosh to perform when chosen.

contact: A record entered in C•A•T to store the full names of individuals and other data.

database, relational: A system where related informational is linked for easy retrieval.

desktop: A custom menu of window placements and sizes.

dialog box: A box that appears on the screen with options or messages for you.

disk: The magnetic medium

on which the Macintosh stores information.

document: A basic record in C•A•T. Each document is filed by contact, activity, and time. Documents can be text, form, or a drawing.

double-click: To position the pointer on something, press and release the mouse button twice in quick succession without moving the mouse.

drag: To position the pointer on something, depress the mouse button, move the mouse, and then release the button.

drawing: A document created using boxes, lines, and text.

edit window: A window for editing documents and data.

event: A record entered in C•A•T to store information about a specific activity with a specific contact on a specific date and time.

export: To copy C•A•T records and make them available for other users via a file.

Finder: The Macintosh program that manages

documents, applications, and files on the Macintosh desktop.

form: A template created using boxes, lines, and text. Boxes of the template may contain references, formulas, and default text.

formula: An algebraic expression used to compute an arithmetic result.

glossary: A custom menu of frequently used text.

icon: A graphic representation of an object, concept, or message.

import: To enter data into C•A•T via a file.

initialize: To prepare a disk for use on the Macintosh.

insertion point: The spot in a field where data is entered (by positioning the pointer and clicking.)

instant search: A method used in C•A•T to select records. When the first few letters are typed, C•A•T instantly finds the best match.

keyword: Text using the {keyname=keyword} format entered in the note boxes of

the name card. Keywords are used to add custom data fields to name cards.

library: A custom menu of frequently used objects.

link: The relationship between records in C•A•T. (e.g. a document is linked to a contact and activity).

list window: A window that shows a list of records.

lock: An action that protects your C•A•T database from unauthorized use.

memory: The place in the Macintosh where information is stored temporarily.

menu: A list of commands that appears when you click on a menu title.

menu bar: A group of menus at the top of the screen.

merge changes: To update a file using changes from the CHG file.

merged document: A document created by combining a template with data from name cards.

mouse: A small device that you roll on a flat surface to move the pointer on the

screen.

name card: An account record and all the associated contact records for the account.

next button: A diamond shaped icon that lets you select records.

notes: Any information that you wish to record in a notes field in C•A•T windows.

open: To display a window by double-clicking on an icon or choosing a command from a menu.

password: A string of characters that you enter to access a locked file.

picture: A graphic object that is passed from one application to another. Pictures can be pasted into text or draw templates.

pointer: A small shape on the screen that tracks the movement of the mouse.

preset tactic: A follow-up activity which can be set up in advance so that whenever a trigger activity is scheduled, the follow-up tactics will be scheduled as well.

preset text: Any text that you wish to set up in advance in a text template.

priority checkbox: A status box on the left side of the Name List, Name Card, and Document List windows.

publish: To export data to other C•A•T users and supply regular update services.

RAM: Random Access Memory. The memory inside the Macintosh that can be directly accessed by the computer. RAM is only a temporary working place while the computer is on.

records: Information that you enter in C•A•T is stored as records, one for each account, contact, activity, and document.

references: text like A:Name that allows you to reference data items from name cards.

report layout: A draw template used to create row and column oriented reports.

save: To store information on a disk.

save as: To save a file to disk using a different name.

scroll: To use the scroll bar or arrows to view different parts of a window's contents.

search box: A bold box used to locate records by name.

select: To point, then click—to select an icon, record, object, box or other item on windows.

sharing: Passing information among users and among applications.

size box: A box in the lower right corner of windows used to resize them by dragging with the mouse.

subscribe: To import data from other C•A•T users and receive regular update services.

template: A text or graphic form used to create merged documents.

view: A list of names or documents. A view is saved criteria that you use to select a list of names or documents.

window: Windows display information for you to view.

Windows can be opened, closed, resized, and moved around on the screen.

work checkbox: A checkbox on the left side of the Name List, Name Card, and Document List windows.

zoom: When you double-click a record to show either the document or more details.

zoom: To display a form with varying levels of magnification.

zoom box: To square on the right side of title bar of a window. Click in it to expand the window to the full size of the screen.

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and FP refers to the Form Processing
Manual. Commands, window buttons,
and menus are capitalized.

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Pictures

You can paste a picture from MacDraw, MacPaint, SuperPaint, Canvas, HyperCard, Freehand, Illustrator, C•A•T, or other PICT and PICT2 (for color) compatible drawing programs.

You can paste one picture per paragraph. Pictures can be resized and centered. The text for the paragraph can only flow to the right of any picture.

Use the pictures to do logos and simple illustrations in the body of your document.

To add a picture

- Copy a picture into the clipboard.

For example, choose the Scrapbook desk accessory from the Apple menu; select a picture; and choose Copy from the Edit menu.
- In a document or template, select a paragraph for the picture.
- Choose Paste from the Edit menu.

C•A•T shows the picture and wraps the text of the paragraph to the right of the picture.

To remove a picture

- Click anywhere on the picture.
- Press the Delete or Backspace key; or choose Clear from the Edit menu.

To position a picture:

Drag the picture left and right in the document.

A picture is always part of one paragraph. Thus it can only move left and right by dragging.

To position a picture vertically, add or remove lines before the picture.

To size a picture:

Hold down the Cmd key and drag the picture.

If you drag to the left and up, the picture gets smaller.

If you drag to the right and down, the picture gets larger.

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C•A•T III Update Manual

For C•A•T Users

Because of thousands of your letters, we were not short on ideas for C•A•T III. You told us that C•A•T is powerful and productive. You also said that additional features and an easier learning curve would make C•A•T indispensable.

Our objective for C•A•T III was:

1. simplify
2. add lots of new features
3. simplify some more.

When you first use C•A•T III, it looks totally new. This is true. But as you use it, you'll find that the basic operations which make C•A•T a productive tool are unchanged.

C•A•T III handles even more of your daily operations. New features use standard menus, tools, icons, language, and formats. Users already familiar with Macintosh word processing and draw programs will be productive instantly.

Don't let the brevity of this manual surprise you. C•A•T III is a whole new product with lots of changes and new features; we just don't need to say much about each item.

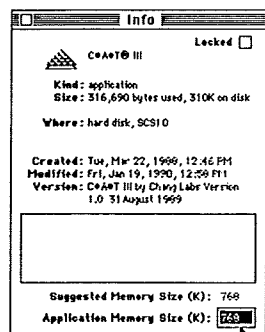
A wise old Oriental said: "A picture is worth a thousand words." A not-so-wise younger Oriental says: "Good interface eliminates a thousand words." Happy computing!

System Requirements

C•A•T III no longer supports the Macintosh 512 with the old ROM's.

The Macintosh 512E, Plus, SE, II, IIX, IICX, IICI, SE/30, and Portable are all compatible.

Macintosh 512E owners and users who have large data files (i.e., file exceeds 300K) should take note of the RAM requirements.



If you're using Multifinder, choose Get Info from the File menu and add 50K to the memory size you set for version 2.

RAM memory

- C•A•T III needs about 50K more RAM. For use with Finder, any Macintosh with one megabyte of RAM is OK.

Choose About Finder from the menu to see the RAM available. With too little, performance becomes sluggish as C•A•T swaps data to and from disk.

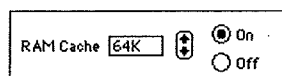
- To optimize performance, choose the Control Panel from the menu to set a 32K or 64K RAM cache.
- To prepare for future system updates from Apple, consider adding RAM to your Macintosh.

Disk storage

The new C•A•T data file is a single file that includes both the old data and notes files. C•A•T automatically copies old files to the new format.

When you choose Save, C•A•T renames the original file—then creates the new file. The old file is not deleted.

The new file will be larger, but less than twice the size of the old files. Make sure you have space on your disk for the new file.



Choose the Control Panel from the Apple menu to set a RAM Cache of 32K; 64K is better. The cache optimizes performance.

Program Installation

- If you are using a hard disk, copy all files from the C•A•T III disk to a new folder on your hard disk.
- If you are using a Macintosh with two floppy disk drives, make a copy of your start-up disk and copy the C•A•T III program to the new start-up disk.

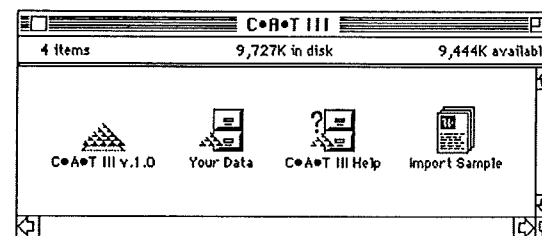
To start C•A•T III

- Double-click the C•A•T III program icon to start up.

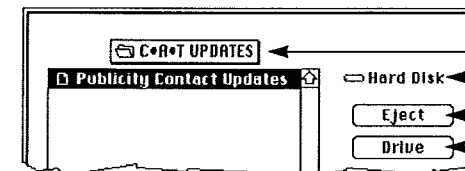
If you double-click your data icon, Finder starts version 2 instead.

After converting to C•A•T III format, you can double-click either the program or data icon.

- Supply the registration information requested. This is only requested the first time you use C•A•T III.
- Open the version 2 data file.



Double-click the C•A•T III program icon to start up.



Open the old C•A•T file. If the old file is in a different folder or drive, locate the file using these buttons and pop-up menu.

To update your files

After displaying a message, C•A•T III is ready for use.

- Choose Save from the File menu.

If you have a large file, this save may require 10 to 15 minutes.

C•A•T III works with either old or new formats.

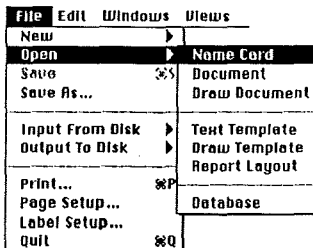
Version 2 only recognizes the old format files. You cannot use version 2 to work with the new file.

If you have more than one C•A•T file, repeat the Open and Save steps for each file.

Overview of Changes

C•A•T looks totally new.

A quick summary helps existing users feel at home with the new interface.



The New and Open submenus list the types of documents that can be created. **Name Card** consolidates the old Account, Contact, Contact List, and Codes windows.

Document replaces the old Data or Event window. 'Document' is more descriptive than 'event'.

Draw Document lets you draw lines, boxes, and text to create a drawing-type document.

Text Template lets you create form letters that reference data from the Name Card.

Draw Template lets you draw forms using lines, boxes, text, and pictures. The boxes can have references and computations.

Report Layout uses the Template window to let you draw row and column type reports.

Templates and layouts are simply specific uses of the term 'activities'.

Menu changes

Depending on the task you select, C•A•T uses different menu bars of menus.

The first three menus of every menubar are always the same. They are:

• File Menu

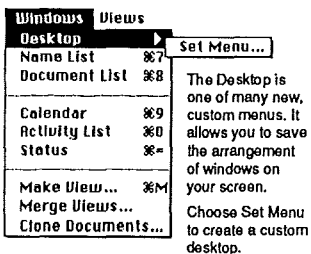
The old Enter menu has become submenus under Open and New.

• Edit Menu

The new menu is shorter and consistent with more Macintosh applications.

• Windows Menu

Commands from the old Show and Action menus are now listed under Windows.



New menu bars

When you choose a command from New, Open or Windows, the remaining menus change to one of the following menu bars:

• Data menu bar

Views is the custom menu of name lists. C•A•T III views can also be a list of documents.

Activities is a new, custom menu of often used activity names. It reduces the steps needed to create documents.

• Text menu bar

Format, Font, Style are standard menus like those available with typical word processors.

Glossary is a custom menu of often used text blocks.

• Draw menu bar

Format, Font, Style are standard menus like those available with typical drawing programs.

Library is a custom menu of often used objects.

Other changes

The Account List window is now called the **Name List**.

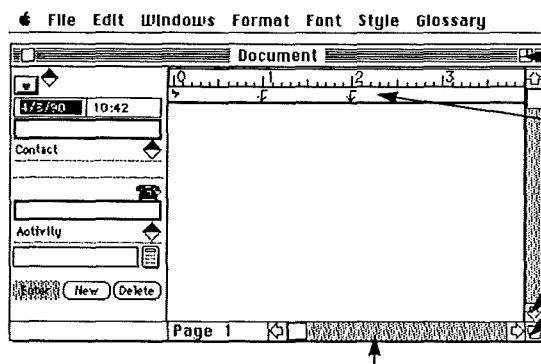
The Events Snapshot is now called the **Document List**.

For most windows, a zoom box, horizontal scroll bars, and continuous scrolling have been added.

You may notice improvements in screen refresh, making C•A•T even faster and more flicker free.

Timing adjustments make C•A•T more responsive to your typing. C•A•T pays more attention to what you type before and during instant searches.

Now, let's proceed window-by-window through C•A•T III.



Click the zoom box to expand a window to the full size of your screen.

The ruler and the text menu bar gives you full word processing control.

When you press on the scroll arrows continuously, C•A•T scrolls continuously.

The size box lets you resize windows.

The horizontal scroll bar lets you scroll left and right within a document.

Name Card

To enter names

The Name Card replaces the old Account, Contact, Contact List, and Codes windows.

- Account data is on the left.
- The list of contacts is at the bottom.
- When you click on a contact, the contact data is displayed on the right.
- Any codes for accounts and contacts are displayed in the note box areas using the new keyword format.
- Existing tables of codes are available using the Keyword button.

To use the Name Card:

- Enter text by replacing the prompt text in each box.
- After you click Enter, the current data stays on screen and the Enter button grays.
- To create another Name Card, click New and the prompt text is displayed again.

- To enter more contacts at the same account, click New Contact after you click Enter.
- The instant search boxes and next buttons for finding names by account or contact are still available at the top of the window.

The Name Card window is divided into two main sections: 'Find account' on the left and 'Find contact' on the right. The 'Find account' section includes fields for Company Name, Street Address, City, State, Zip, Phone #, and Acol #. The 'Find contact' section includes fields for Last Name, First Name, Title, Dear First-name, Nick Name, Extension #, Mail Stop, User 1, and User 2. Below these fields are two large text areas for notes, each with a 'New' button and a 'Keywords' button. At the bottom of the window is a table with columns for Name, Title, and Phone, and buttons for New, Delete, Keywords, New Contact, Del Contact, and Defaults...

The salutation is chosen from this pop-up menu. You have more choices than before.

User1, User2, and Acct# are optional boxes that you can use for any data.

To change the prompt text (i.e., 'User 1'), type whatever text you want, then click the Defaults button. The prompt text can be set to the most frequently entered text like your local city name.

Keywords

To enhance searching—tables of codes have been replaced by keywords.

When creating views using Make View, C•A•T III can search for any word in the note boxes. If you type:

Joe is a golf buddy from college.

You can search for 'golf', 'buddy', 'college', or any word to create lists of names.

Keyword format

To allow explicit keyword search, use {} to bracket words. For example, the previous text can be typed as follows:

{golf} {buddy} from {college}

This keyword format allows faster, more precise searches by searching only the phrases in brackets.

To reference keywords

To allow references of keywords from letters and templates, type the keyword preceded by a keyname. For example:

{hobby=golf}
{3=Vendor}
{FAX=555-1212}

You can use this format to add custom fields to the Name Card for special uses like home addresses, Apple-Link IDs, home phone numbers, etc.

(For references, see description of Text Templates.)

The Codes window displays a list of codes for various categories. The categories are: Country, Full state name, Category, Last transact., Newsletter, Renewal date, Table-7, and Table-8. The codes are listed in a table with columns for the category and the code value.

Above is a Codes window from version 2. To the right is the same account in C•A•T III. The codes now appear in the notes box using the new keyword format.

You can reference codes by table names and search for them using Make View.

The Name Card window shows the same account as the previous screenshot, but with codes now appearing in the notes box using the new keyword format. The codes are listed in a table with columns for the category and the code value.

Making Views

To search using keywords

Make View has been enhanced to allow search using:

- keywords in the account or contact note boxes
- any words in the account or contact note boxes
- the date the Name Card was created or last modified
- the new & operator for compound conditions.

To search for a keyword, type the keyword without brackets in the Keyword box. For contact keywords, type in the cKeywrd box.

If the keyword format includes a name, then type 'name=keyword' instead.

For example, to find all fax numbers that start with '555', type:

FAX=555

To search for version 2 code values of 'Vendors' from the table 'Src', type:

Src=Vendors

To use these operators, select the insertion point and click the one you want.

In this example, C•A•T searches for all records that have the keyword (Active) in its notes box and a zip code in the 90..99 range.

Enter a date in these boxes to search for all Name Cards by date. For example, enter '>1/1' to find all Name Cards created since the beginning of the year.

To search all words

To search all words without regard for the special keyword format, check the All words checkbox on the right.

Text Templates

C•A•T III uses the Activity window to create templates.

- To create a text template or form letter, choose New Text Template from the File menu.

Format	Font
Hide Ruler	Style Glossary
✓Left Align	Plain %T
Right Align	Bold %B
Center	Italic %I
Justify	Underline %U
Single Space	Shadow
1-1/2 Space	Superscript %+
Double Space	Subscript %-
Other Spacing	0 pt
Page Break	10 pt
Show ¶	✓12 pt
	14 pt
	18 pt
	24 pt
	Other...

After you click Enter, the button grays and the current template remains on screen.

To add a reference, select the insertion point and click Paste Ref. Then choose a reference from the pop-up menu.

C•A•T shows page breaks on screen. You can set page breaks from the Format menu.

Word processing

When creating text templates, C•A•T uses standard word processing controls.

- Use the ruler to set margins, tab stops, and indents.
- Choose justification, spacing, and page breaks from the Format menu.
- Choose text font, size, and style from the Font and Style menus.
- Use the Glossary menu for saving and pasting frequently used text blocks.

Use the pop-up menu to assign the activity to a class. There are 2 new classes.

Click the zoom box for more workspace.

References

Instead of merge codes, C•A•T III uses industry format references. The format for references is:

<C: Name>
<A: Name>

The letter before the colon designates account (A) or contact (C) data. The name following the colon shows the item to reference.

You type references into a template. To type '<', press Opt-\. To type '>', press Opt-Shift-\.

References can refer to keynames in the notes field. For example:

<A: Fax>
<C: 1>

Insert markers

Preset text markers (> <) from version 2 have been replaced by insert markers {}. Also, markers are now optional and are not documented for normal use.

Preset text markers show the start and end of preset text blocks; whereas insert markers show the start and end of inserted text.

To insert personal notes for a document, you type between insert markers.

If a template uses insert markers, C•A•T operates as before. Only the inserted text for each document is saved.

This saves space. C•A•T uses the latest data from the Name Card and text from the template to reconstruct documents when you retrieve a saved document.

No insert markers

If a template has no insert markers, C•A•T III saves all the text again for each use of the template.

References to data from the Name Card are also saved and not refreshed when you retrieve a saved document.

This archival copy has the following advantages:

- The original address on the document is retained.
- When creating a document, you start with the text of the template; make word, format, or any changes to the text; and all changes are saved for retrieval.

This latter approach is less restrictive, more intuitive, and is the recommended way to use C•A•T III.

You can add formatting to existing templates. Do not delete insert markers from existing templates. This creates confusion when saved documents are retrieved. Create new templates instead.

Activity List

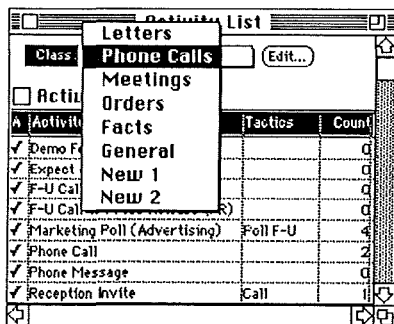
Text templates are shown on the Activity List by class as with version 2.

- The buttons in version 2 for choosing a class have been replaced by a pop-up menu.
- The Set Class command for changing class names has been changed to use the Edit button.

- Templates can be added to the custom Activities menu.

To add a template, select the template; choose Set Menu from the Activities menu; and click New.

To create a document using the template, choose the template from the Activities menu.



Documents

The new Document window is similar to the old Data window—but the layout has changed.

- To create a new document (or event), choose New Document from the File menu.

Use the bold boxes on the left to select a contact and template—and create the merged document to the right.

Alternatively, use the Name Card to select a contact and choose a template from the custom Activities menu. This is the new, simpler way to create documents.

Click the file drawer icon to open the Document List window.

Use these instant search boxes to select contacts and activities.

Click here to open the Name Card.

Click here to open the Name List.

Click here to open the Activity List, double-click to open the template window.

If the contact, account, or activity name is too long, C•A•T now shows as much as possible.

Insert personal text between insert markers.

Word processing

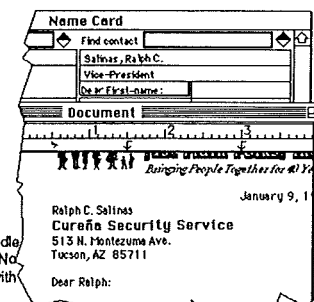
When editing documents, C•A•T uses standard word processing controls.

- Use the ruler to set margins, tab stops, and indents.
- Choose justification, spacing, and page breaks from the Format menu.
- Choose text font, size, and style from the Font and Style menus.

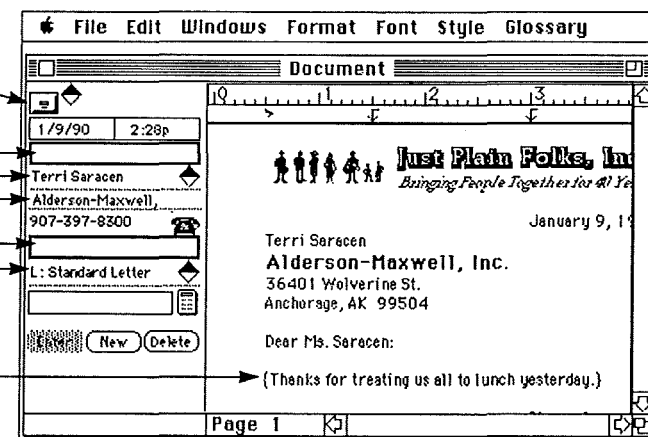
Other changes

The recurring feature is no longer supported.

Push, Pop, and Xchg are no longer needed. When you click Enter, the button grays and the document stays in the window.



C•A•T now removes middle initials from salutations. No more letters beginning with "Dear Ralph C."



Draw Templates

Draw tools

Formulas & references

Draw templates are used to create graphical forms. A draw template is simply boxes, lines, pictures, and text. The boxes allow data entry in merged documents and can contain formulas for references, computations, and default text.

When creating draw templates, C•A•T uses standard draw tools.

- Create boxes, lines, and text with the standard tool box.
- Choose alignment, line pattern and size, and fill pattern from the Format menu.
- Choose text font, size, and style from the Font and Style menus.
- Use the Library menu for saving and pasting frequently used objects.
- Double-click on objects to set colors, borders, and box formulas.

When editing objects, C•A•T varies from standard draw programs.

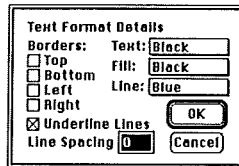
To edit the text in a box, you don't need to first select the alpha tool—just select the box.

To move an object that is selected, point to an edge of the object and drag to move.

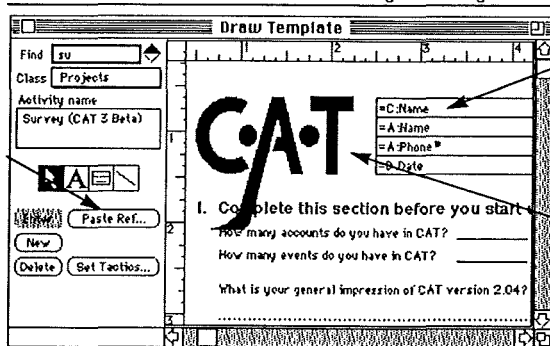
To delete an object, use Cut or Clear from the Edit menu—not the Delete key.

To insert references to the Name Card or to create formulas for computations, you can:

- type directly into boxes
- use the Paste Ref button
- double-click on a box and use the special dialog for creating formulas.



File Edit Windows Format Font Style Library



To insert a reference, select the insertion point and click Paste Ref. Then choose a reference from the pop-up menu.

Double-click on objects to set colors, borders, and box formulas.

References show what data is merged from the Name Card.

In this example, the document data, contact name, etc. will replace the references.

You can paste graphics from the Scrapbook or from other programs.

See the Forms Processing Manual for more details.

Merging Forms

To complete forms

To refresh calculations

- To create a merged document using a draw template, choose New Document from the File menu.

- Use the instant search boxes to select a contact and a draw template.

Similar to text documents, C•A•T merges all references and displays the form.

- You can point, click, and type to complete the remaining parts of the form.

- To update any computations, click Enter.

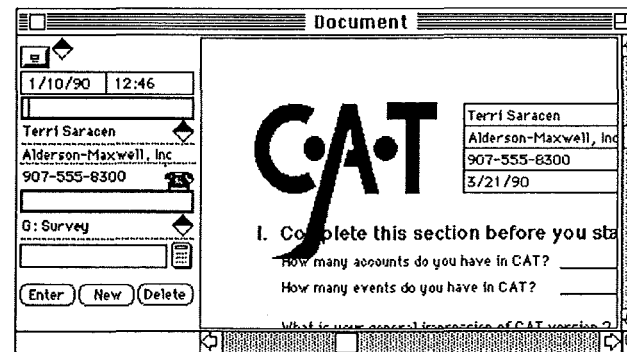
Generally, text can be typed into any box on the form.

- If the box has the special Checkbox formula, you can only click to check or uncheck the box.
- If the box contains a computed result, you cannot select the box nor make any direct editing changes.
- If the box contains a reference, the merged data can be changed to allow entry of alternate data.
- You cannot change fonts, sizes, and styles for text in merged forms. To change formatting, open the Template window.

Similar to text documents, references in merged forms can be cold-linked or hot-linked.

When you create a new document, C•A•T merges the current data from the Name Card. When the document is saved, the merged data is saved with the document and not refreshed.

If you wish to refresh the merged data, click the calculator icon. The calculator refreshes all references and recomputes all formulas.



References are replaced by data from the Name Card. Formulas are automatically computed.

Draw Documents

Draw tools

About drawings

You can create documents using the draw tools. The draw document is simply boxes, lines, pictures, and text you create.

- To create a draw document, choose **New** ▸ **Draw Document** from the **File** menu.

C•A•T opens the Document window and shows the drawing tool box in the upper left.

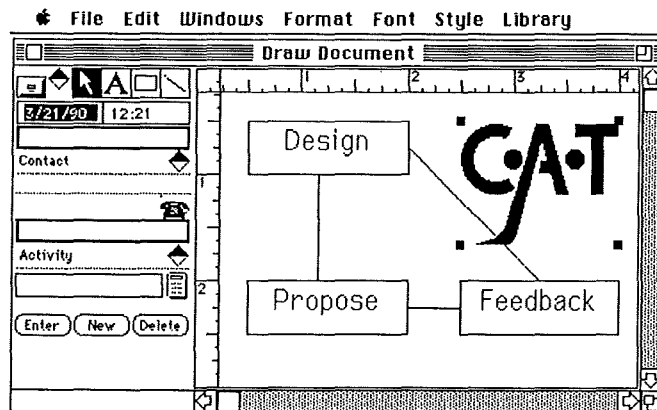
When creating draw document, C•A•T uses standard draw tools.

- Create boxes, lines, and text with the standard tool box.
- Choose alignment, line pattern and size, and fill pattern from the **Format** menu.
- Choose text font, size, and style from the **Font** and **Style** menus.
- Use the **Library** menu for saving and pasting frequently used objects.
- Double-click on objects to set colors and borders.

If you select an activity that is a text or draw template, the template is not used. However for document search, the draw document is searchable using the selected template name.

Otherwise, draw documents are filed, printed, and retrieved in the same way as all documents.

The tool box and draw menus are available when you choose **Draw Document**.



Document List

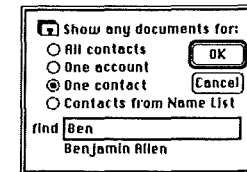
Setting search criteria

To save the document list

The Document List is similar to the old Events Snapshot. The enhanced window lets you:

- Locate accounts, contacts, activities, and activity classes by typing the name.
- Save custom views of document lists for easy access from the **Views** menu.

- To set the document list search criteria, click one of the three file drawers.



- Click to set the search criteria and type in the instant search box to select specific names.

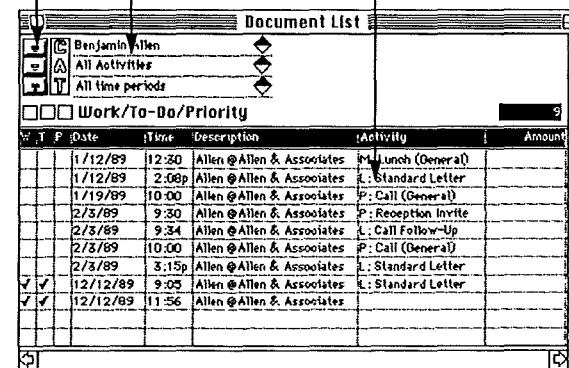
- Click **OK** and C•A•T shows all matching documents, as before.

Double-click to open the Name Card, Template window, and Calendar.

Click to open the Name List, Activity List, and Calendar.

Click on a file drawer to set the search criteria.

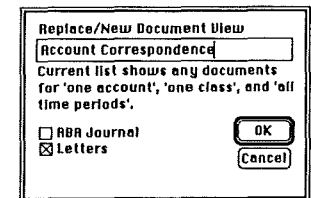
Double-click to open any document.



- Click file drawers and checkboxes to set the Document List to show the documents you want.

- Choose **Set Menu** from the **Views** menu.

- On the custom menu dialog, click **New**.



The checkboxes let you select specific accounts, contacts, classes, activities, and date ranges. If you don't check a box, the view when chosen uses the last selected item.

- Name the view, check your options, and click **OK**.

A new view is added to the menu.

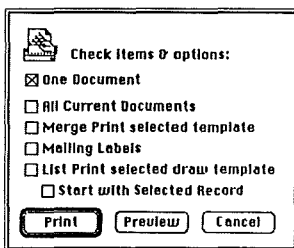
When you choose the view, the settings for all the file drawers is set to display the list of documents you want.

Printing Documents

C•A•T III prints all kinds of documents including letters, forms, dossiers, calendars, and reports.

The old Set Format and other formatting steps are no longer needed. Font, size, style selection is set on screen.

To print documents, choose Print from the File menu, select from the simplified choices, and click Print.



Use the new drawing features to custom design your own dossiers, calendars, and reports. (see the Forms Processing Manual)

The Page Setup settings are now saved with your data file.

Print preview

C•A•T's new print to screen allows zooming to see document details.

- Click on the document to zoom and unzoom.
- If you click in the gray area outside the document, C•A•T proceeds to the next page.
- Click outside the dialog box like in the menu bar to cancel the preview.

To merge print

A new option lets you merge print a template without creating a document for each contact. To use merge print:

- Display the accounts you want in the Name List.
- Choose Activity List from the Windows menu and select the template you want to use.
- Choose Print from the File menu and check Merge Print.
- Click Print (or Preview).

C•A•T merge prints one document for each name on the Name List.

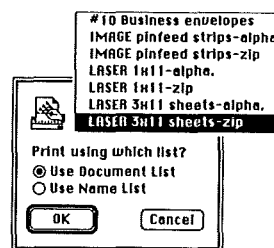
The List Print option is similar except C•A•T prints as many records as will fit on each page. (see the Forms Processing Manual)

Printing Labels

You can set up and save multiple layouts for mailing labels.

- To print labels, choose Print from the File menu, check Mailing Labels, and click Print.

Before printing, C•A•T shows the dialog below asking which layout and which list to use.



- Make your selections and click OK.

Mailing labels can now print as many lines of street addresses as will fit on a label.

If the name is a personal contact with no company affiliation (i.e. the last name is used for the account name), the company item is not printed.

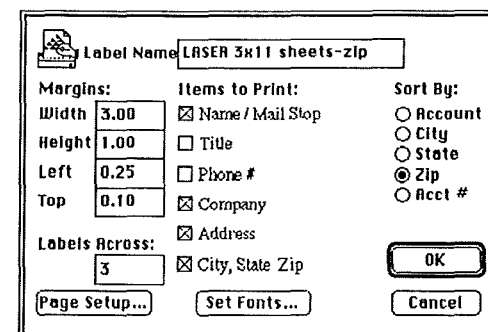
Normally, C•A•T prints a label for each selected contact. If an account has no contacts, C•A•T still prints a label using just the account data.

Label setup

- To set up a mailing label, choose Label Setup from the File menu.

- Click New.

A dialog of label options is shown. You can set margins; select items to print; set the font, size, style; select the sort sequence; and set the page setup.



- Select your options and click OK.

On the Page Setup options, make sure you select No Margins for the Imagewriter and the Larger Print Area for the Laserwriter.

Labels need a print area that includes as much of the full dimensions of the paper as allowed by each printer.

Click on an item to set the font, size, and style for items one at a time.

Click Set Fonts to set the font, size, and style for all selected items.

Sharing Files

C•A•T III offers new ways to share data:

- faster import and export
- merging changes from remote users
- and publishing and subscribing to names and templates.

Unlike file-server based databases, the C•A•T modes for sharing are not restricted by the complexity and speed limitations of network solutions.

Each user has full access to all commands and the performance of a dedicated computer.

Remote user

If you want to use the C•A•T database while on the road and office users need to use it at the same time—use the Auto-save Changes and Merge feature.

- As the remote user, take a copy of the database.
- Choose Output To Disk ▸ Set Auto-save Changes from the File menu and turn on Auto-save as shown below.
- On the road, you make changes or add new records in the normal way. C•A•T creates a small CHG file containing your changes.
- When you return to the office, give the office user the CHG file.

Office user

The office user loads the office copy of the database.

- Chooses Input From Disk ▸ Merge Changes from the File menu.
- Opens the CHG file created by the remote user.

C•A•T merges all changes from the remote user into the office copy.

New records are added and changes are updated only if the update is more recent than the office copy.

Select this option to protect against loss of data.

Use this option on long trips, with multiple updates (by modem or disk) during the trip.

Select this option on short trips with one update at the end of the trip.

Auto-Save changes Into the CHG file. (i.e. track record changes)

☐ Turn off auto-save.

☐ Delete CHG file after successful save.

☒ Add changes into the same CHG file.

OK Cancel

Publish & Subscribe

The Publish & Subscribe model lets you publish a file of names or templates.

Other users can subscribe to the data.

The subscriber may use the names and templates to create their own merged documents.

When you have updates to the names or templates, you again publish the names or templates.

For existing subscribers, updates replace and do not create new records in the subscriber's database.

This allows one user to maintain a list while many subscribers use the up-to-date list.

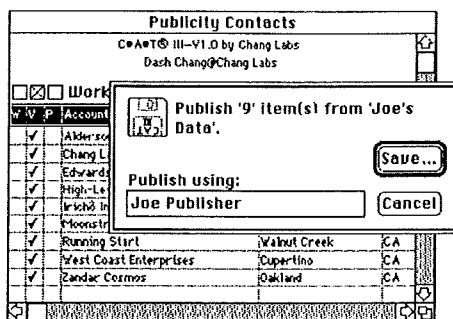
(Publish & Subscribe will become fully automated when Apple's System 7.0 is available.)

To publish the data

- To publish data, select a list of names or templates using the Name List or the Activity List window.

- Choose Output To Disk ▾
Publish Data from the File menu.

A dialog requests the publisher's name. The publisher identifies the source of the data for subscribers. Once set, the name should not change.



- Enter a publisher name and click Save.

C•A•T asks for the name of the data file.

- Name the data file by its contents.

It's a good idea to use file names like 'Dec press upd'.

- Click Save.

You can pass the file to your subscribers by mail or by downloading to a file server.

Repeat these steps for updates.

Generally, one database should have only one publisher.

But a subscriber can receive data from many different publishers.

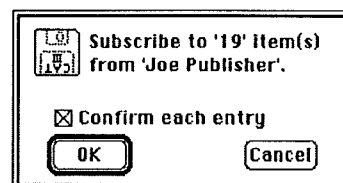
To subscribe to data

To subscribe to the data:

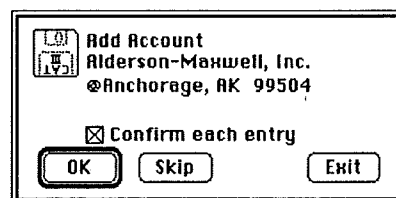
- Choose Input From Disk ▾
Subscribe To Data from the File menu.

- You will be asked which file to open. Double-click the file you want.

C•A•T shows a dialog of options.



- Select your options and click OK.



As each account is entered, it is displayed. You can accept or choose to skip it.

To subscribe to updates

Repeat the same steps when updates from the publisher are received.

Changed records are replaced and new records are added to your data file.

Importing & Exporting

To prepare text files

The new Import Text command lets you directly load text files created by other applications.

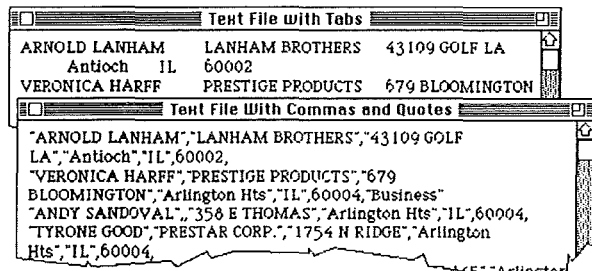
Also, import is much faster.

If you want to organize multiple contacts from the same company into a single Name Card, sort the text file by the account name.

Import Text organizes consecutive records with the same address into one Name Card.

To create a text file from other applications:

- From FileMaker, choose Output To and click Tab.
- From File, choose Save Records As and click Text.
- From Works or Excel, choose Save as and click the Text option.
- From Word or MacWrite, use tabs to separate name, address, city, state, etc. Choose Save as and click the Text and the Paragraph options.



Here are three formats supported by C-A-T. The two above are Word files. The upper one separates fields using tabs; the lower one uses quotes and commas. Below is a spreadsheet. Each field is one column. Choose Save As and select the Text option for import to C-A-T.

	A	B	C	D	E	F
1	ARNOLD LANHAM	LANHAM BROTHERS	43109 GOLF LA	Antioch	IL	60002
2	VERONICA HARFF	PRESTIGE PRODUCTS	679 BLOOMINGTON	Arlington Hts	IL	60004

To Import names

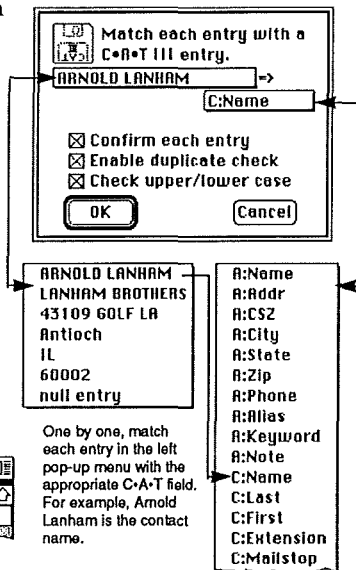
- Start C-A-T and choose Input From Disk ▾ Import Text from the File menu.

The open dialog allows you to select the text file.

- Double-click on the file you want to import.

The import dialog below lets you set import options.

C-A-T checks for duplicates, translates all caps into upper and lower case, and lets you accept or reject records one by one. Duplicate check on large files can be time consuming.



One by one, match each entry in the left pop-up menu with the appropriate C-A-T field. For example, Arnold Lanham is the contact name.

C-A-T shows the first record in the pop-up menu to the left.

- Choose each entry and choose the matching C-A-T entry from the pop-up menu to the right.
- Click OK to start the import.

You can choose A:Address, A:Keyword, A:Note, C:Keyword, C:Note for as many fields of the text file as you want. Other C-A-T fields should be selected only for one field.

A:CSZ parses city, state, and zip data that has been entered as one field in the text file. C:Name does the same for the contact's first and last name.

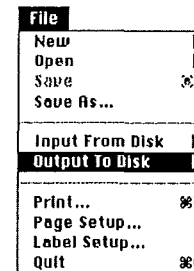
To export C-A-T data

You can send C-A-T data—with contacts, templates, and documents—to other C-A-T users.

The Export Data command is the fastest way to move data and exports font, size, style, format, and picture data as well as any text.

- First, show the accounts you want to export on the Name List.
- Choose Output To Disk ▾ Export Data.

C-A-T asks you to name the file and then does the export.



Export Text is not available in version 1 of C-A-T III.

Use Export Data to create a disk file of C-A-T files for use by another C-A-T user.



Use Import Text to import a disk file created using another application.

Use Import Data to import a disk file of C-A-T files from another C-A-T user.

To Import C-A-T data

- Choose Input From Disk ▾ Import Data.

C-A-T displays a dialog and asks which file to open.

- Double-click on your choice.

C-A-T gives you the option to confirm each entry.

- Make your choice and click OK.

Each imported record is added to your database, without checking for duplicates.

Tactics

To set tactics

Tactics allow you to automate **follow-up activities**. For example, whenever you send a business proposal, a follow-up call is scheduled a week later.

Each activity can be either a draw or text template.

Every activity can **trigger** up to four other activities with preset delays.

To set tactics, you need to first create all the activities—both the trigger and follow-up activities.

- Select and open the trigger activity or template.

In the example below, the 'Cold Letter' is the trigger activity and will be followed by a follow-up call seven days later.

- Click Set Tactics.

C•A•T opens the Tactics window.

- Select Days and type the number of days by which the follow-up activity should follow its trigger activity.

- Select the search box and select the follow-up activity.

You can select the follow-up activity by typing the name or selecting it from the Activity List window. See 'Selecting Templates' in this chapter.

- Click the close box; then click Enter on the Template window.

When the trigger activity is used to create a merged document, C•A•T automatically creates each follow-up activity as a merged document.

These follow-up documents can be found, selected, and opened using the Document List window.

Text Template

Find: col

Class: Letters

Activity name: Cold Letter

Enter Paste Ref... New Delete Set Tactics...

Page 1

Tactics

Cold Letter

Days	Preset followup activities
7	C-Ltr F-U
0	
0	
0	

Preset Rate:

The follow-up activity can precede the trigger.

For example, you can have an appointment automatically trigger a confirmation call one day prior by entering -1.

A production problem caused the last line of some paragraphs to be omitted. The omitted lines include:

- Page 1-6 column 2:
files at once.
- Page 2-12 column 3:
template.
- Page 2-14 annotation:
corner of the box to resize it.
- Page 4-15 column 1:
including the space.
- Page 5-2 column 2:
lists'.
- Page 5-10 column 1:
point.
- Page 5-12 (see the back of
this errata sheet)
- Page 8-3 column 1:
documents on-screen.

- Page 1-7 column 2:
versus double-click.
- Page 2-13 column 2:
now visible.
- Page 2-14 column 1:
characters.
- Page 2-18 column 1:
changed.
- Page 2-21 column 1:
and logos.
- Page 3-59 column 1:
To position a picture:
Drag the picture left and
right in the document.
A picture is always part of
one paragraph. Thus it can
only move left and right by
dragging.
To position a picture verti-
cally, add or remove lines
before the picture.
- Page 3-59 column 1:
To size a picture:
Hold down the Cmd key and
drag the picture.
If you drag to the left and
up, the picture gets smaller.
If you drag to the right and
down, the picture gets larger.

- Page 1-5 column 2:
references, formulas, or
default text.
- Page 2-11 annotation:
mouse.
- Page 2-17 annotation:
bordered using a dot pat-
tern.
- Page 2-21 column 3:
amount column.
- Page 5-59 column 2:
examples need quote marks
""
=checkbox ("X")
=checkbox ("Yes")
=checkbox ("✓")